COMPUSEARCH

VPO PRISM

Solicitations

User Workbook

Web Version 3.29

TRADEMARKS

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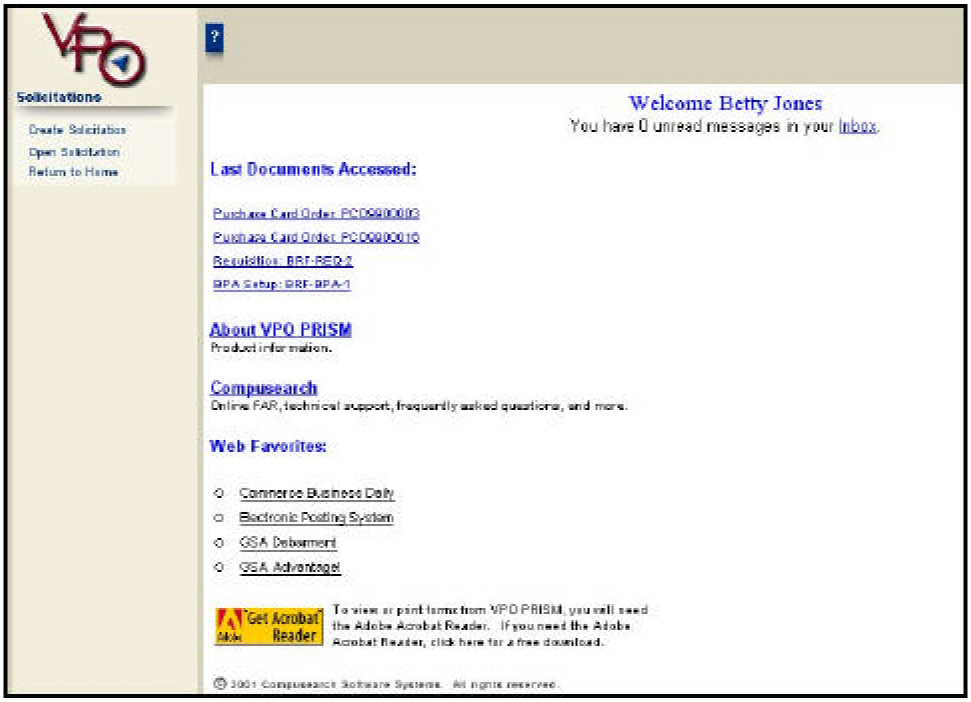
Creating a Solicitation



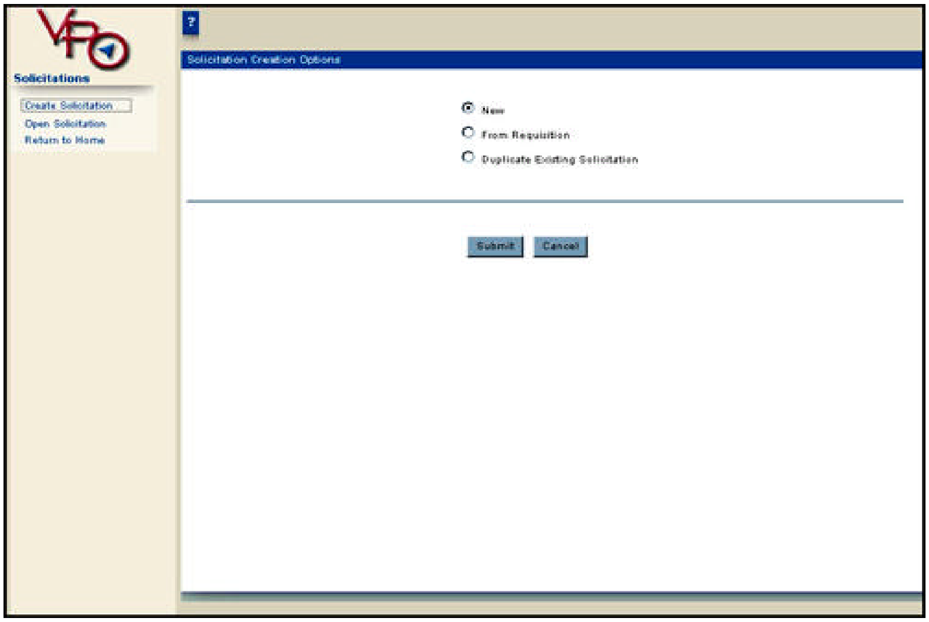
Click **Solicitations** on the Menu of the *Welcome* page to open the *Solicitations* page. The Menu will display the following choices:

?? **Create Solicitation** Click to select the type of new solicitation to create.

?? **Open Solicitation** Click to select a Solicitation to be opened. Refer to Editing a Solicitation.

?? **Return to Home** This option closes the current screen and returns you to the *Welcome* page.

NOTES:



To create a solicitation click **Create Solicitation** on the Menu. The *Create Solicitation Options* page will display giving you the following choices:

?? **New** — Creates an entirely new solicitation. The *Create New Solicitation* page will display.

?? **From Requisition** — Opens a *Create Solicitation from Requisition* page where available requisitions may be viewed and selected by line item or as a whole.

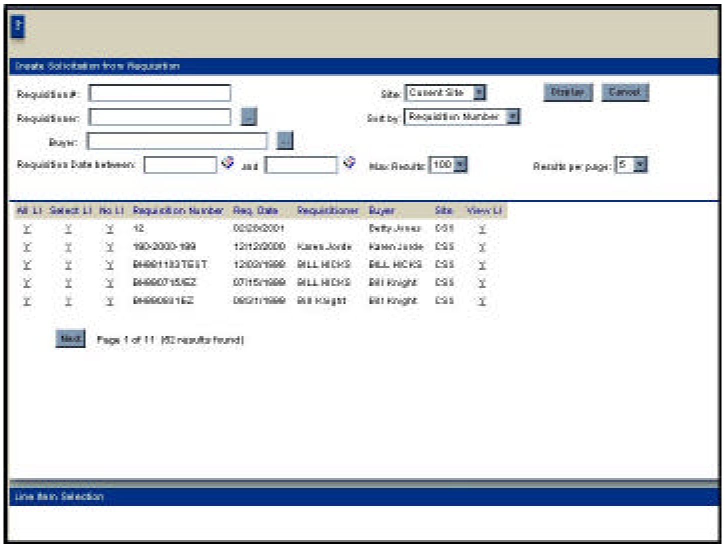
?? **Duplicate Existing Solicitation** — Opens the *Solicitation Selection* page where available solicitations may be viewed and selected. This option is used when pulling data from a similar solicitation. Refer to Duplicating a Solicitation.

Click the option button desired, and then click **Submit** to continue or **Cancel** to return to the *Welcome* page.

If you have selected **From Requisition** and make a selection, or **New**, the *Create New Solicitation* page will display. From that point, the procedure for either option is the same.

NOTES:

Creating a Solicitation from a Requisition



To create a solicitation from a requisition, select **From Requisition** on the *Create Solicitation Options* page. You can search for a specific requisition by entering its requisition number, the requisitioner, buyer, or site in the appropriate field. You can further refine your search by searching between certain dates. Once the information you desire to use has been entered, click **Display**.

All valid documents available in PRISM will appear, with the following hyperlinks.

?? **All LI** Click **Y** to add all line items in the selected requisition to the contract.

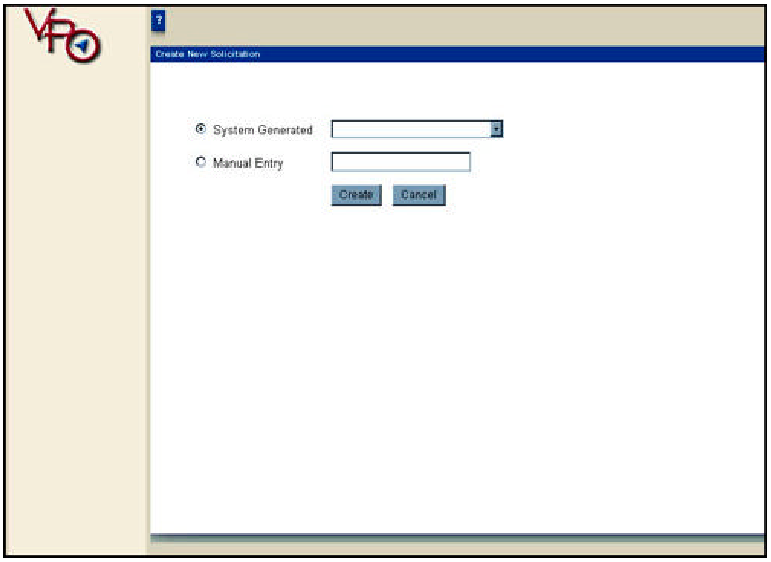
?? **Select LI** Click **Y** to display all line items in the selected document in the *Line Item Selection* section at the bottom of the page. Select the checkbox to the left of the desired items and click **Create** to create the solicitation.

?? **No LI** Click **Y** to associate the document with the selected requisition without actually pulling any line items forward.

?? **View LI** Click **Y** to view the line items in the *Line Item Selection* section. **Select LI** must then be selected to actually select any of the items viewed.

If you have selected **New**, or **From Requisition** and make a selection, the *Create New Solicitation* page will display.

NOTES:



What you see on this page is dependent on your agency setup. PRISM can be set up in four ways.

1. *Mandatory System Generated Numbering* **-** Agencies can require a system-generated number. If this is true, only the **System Generated** checkbox will display and you must select a **Mask** from the drop-down list. A mask is a format that helps PRISM identify the document types available and allows autonumbering. Your System Administrator sets up masks.

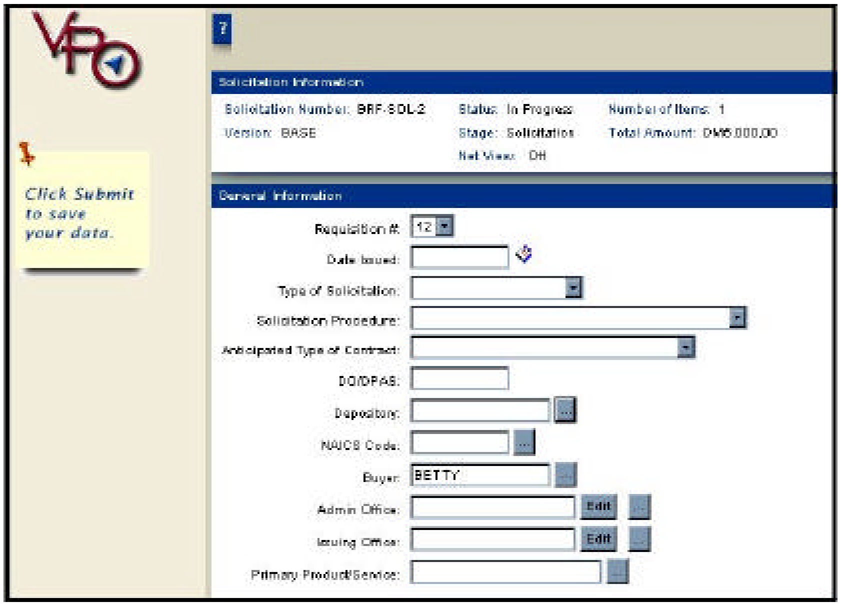
2. *Mandatory-Manual Numbering* **-** Agencies can require a manual number. If this is true, only the **Manual Entry** field will display. You must type in a number.

3. *Optional Numbering* **-** Agencies can allow both options. In this case, PRISM defaults with the **System Generated** checkbox selected. If a manual number is desired, you must select **Manual Entry** and type the number in the **Manual Entry** field.

4. *Auto Numbering* – PRISM will automatically number the document. The numbering box will never be seen.

Once the information has been entered, click **Create** to create the new solicitation or **Cancel** to return to the *Welcome* page.

NOTES:



The *Solicitation Information* page will now open. It is comprised of two sections, the *Solicitation Information* section and the *General Information* section.

The *Solicitation Information* section displays basic information about the current document. The information is system generated based on information entered in other sections. It cannot be edited here. This section includes the following information and remains constant for all selections on the Menu.

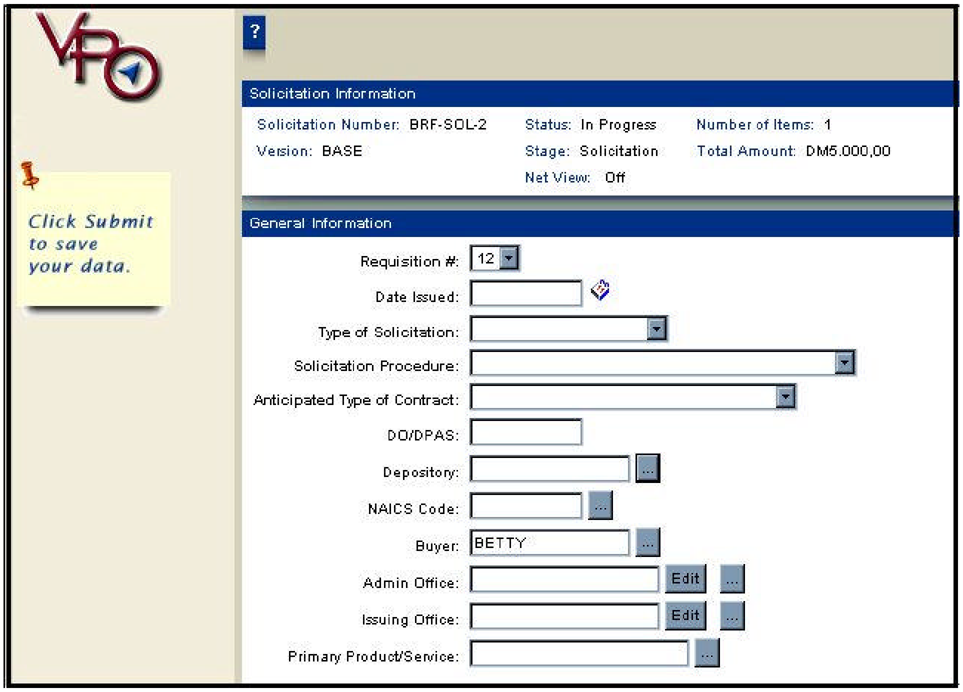
?? **Solicitation Number** Displays the assigned solicitation number.

?? **Status** The document status is determined by where the document is in the creation and approval process. Refer to Status History for a complete discussion of status.

?? **Number of Items** Displays the number of line items included in this solicitation.

?? **Version** There can be multiple versions of a document. A designation of Base indicates that this is the original document. If amendments have been created, then the amendment number would appear.

NOTES:

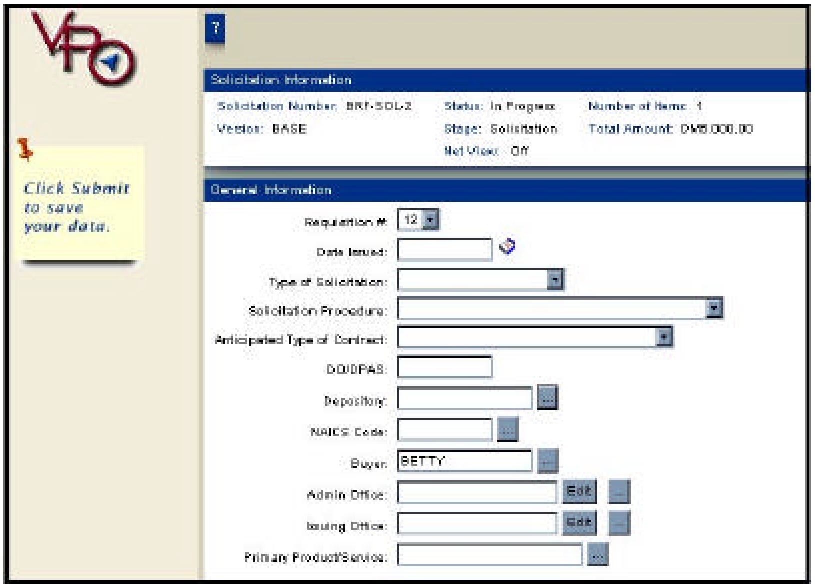


?? **Stage** — This will display where the document is in the procurement process. Examples of stages include requisition, solicitation, award, closed, etc.

?? **Total Amount** — Displays the total amount of the solicitation.

?? **Net View** — If more than one version of the document exists, PRISM can combine the results and offer a Net View. This means that if Net View is turned on, the Number of Items and the Total Amount fields will be based on all versions of the document. If Net View is turned off, only the data related to the current open version will be displayed. Net View can be turned on or off by clicking **Net View** on the *General* page. If there are not multiple versions of the document, the Net View button will not be displayed and the setting will be Off.

NOTES:



The *General Information* section displays information that can be edited, either by direct entry or by selection from drop-down lists.

The *General Section* contains the following fields. Enter missing information, or correct information brought forward.

?? **Requisition #** — If this was created as a new solicitation, PRISM will display None. If created from a requisition, the requisition number would appear.

?? **Date Issued** — Enter the date the solicitation is released to vendors or click the calendar icon and select the appropriate date.

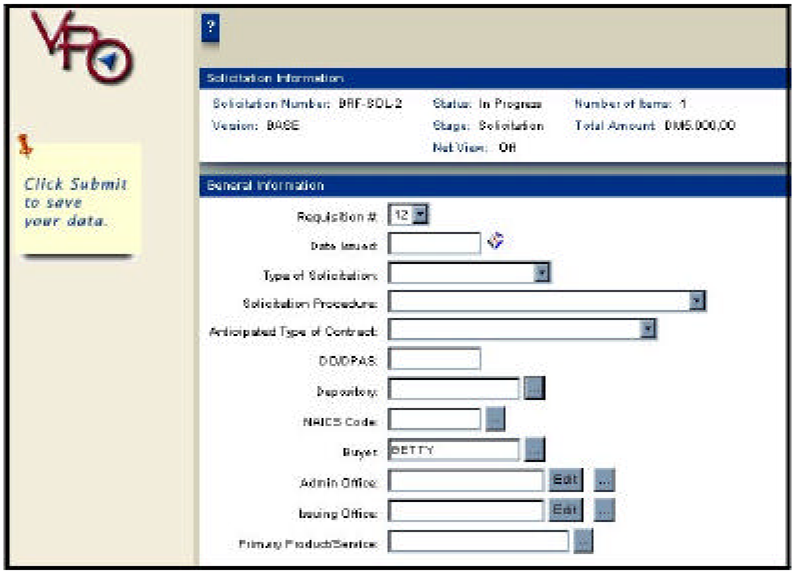
?? **Type of Solicitation** — Enter or select the type of request being made from the drop-down list. This is a required field.

?? **Solicitation Procedure** — Enter or select whether the solicitation will be competed or nor, and if not, what type of procedure will be done, from the drop-down list.

?? **Anticipated Type of Contract** — Enter or select the type of contract the agency anticipates using once the award has been made from the drop-down list.

?? **DO/DPAS** — Enter any priority number for use with the current national defense requirements, and if necessary, in time of national emergency.

NOTES:



?? **Depository** Enter this information, or click the lookup button to display the available locations where bids should be dropped off by the vendor. The System Administrator maintains this list.

?? **NAICS Code** Enter the North American Industry Classification System (NAICS) code or click the lookup button to make a selection.

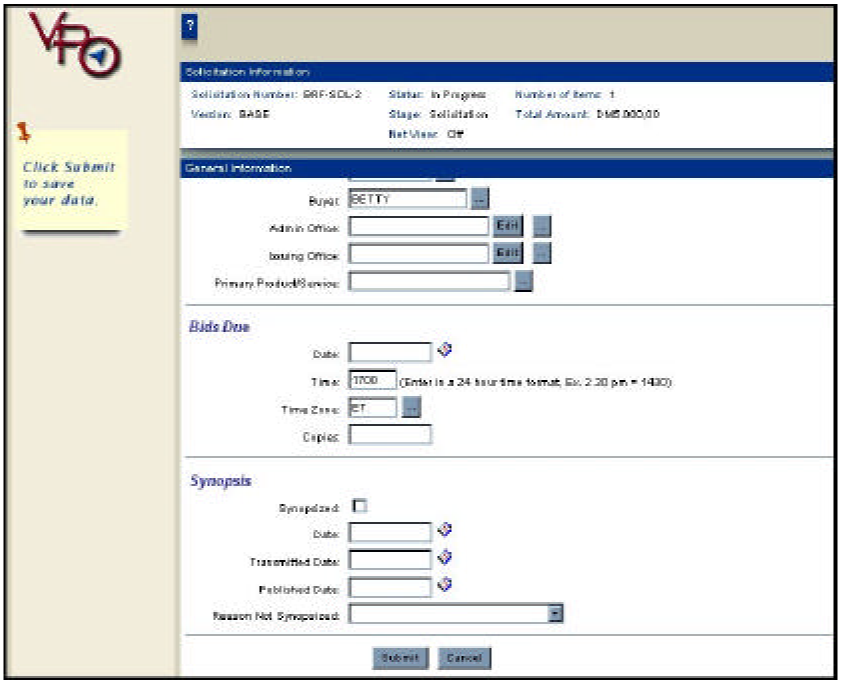
?? **Buyer** Enter the User ID for the designated Buyer or click the lookup button and select from the list provided.

?? **Admin Office** Enter the code of the office responsible for the administration of the solicitation or click the lookup button and select from the list provided. Click **Edit** to make changes to the address information. These changes will only affect this document and will not change the PRISM database.

?? **Issuing Office** Enter the code of the office issuing the solicitation or click the lookup button and select from the list provided. Click **Edit** to make changes to the address information. These changes will only affect this document and will not change the PRISM database.

?? **Primary Product/ Service** Enter the code for the principle product/service being ordered, or click the lookup button and select from the list provided. Product/Service codes are the four character codes used to report to the Federal Procurement Data System (FPDS). PRISM is delivered with a database of current FPDS product codes.

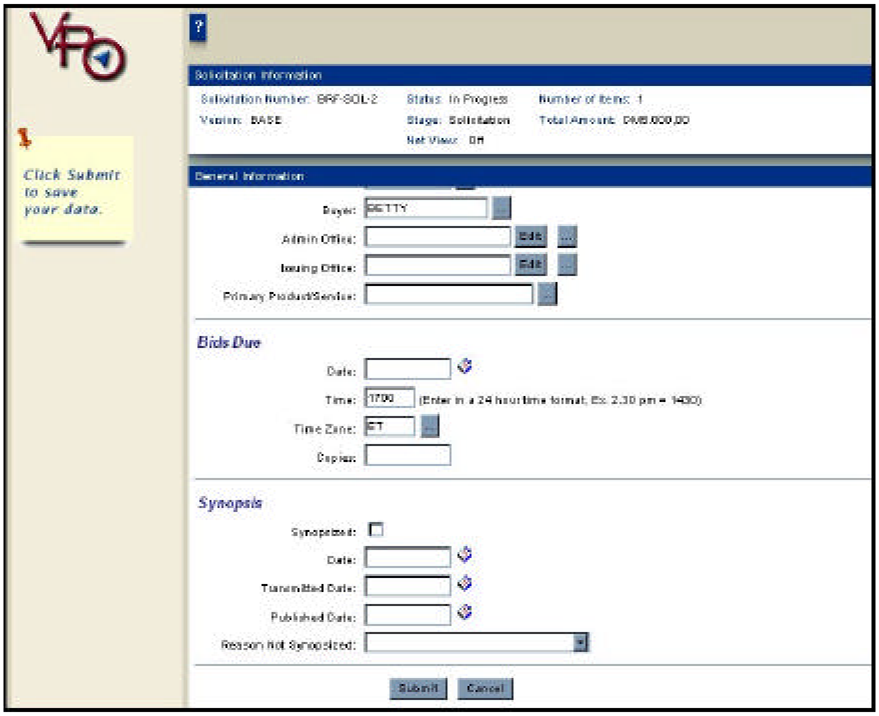
NOTES:



The *Bids Due* section determines the date when bids are to be submitted to the agency. Enter information in the following fields:

- **Date** — Enter the date bids must be submitted or click the calendar icon and select the appropriate date.
- **Time** — Enter the cutoff time when the bids must be submitted.
- **Time Zone** — Enter the time zone for when the bids must be submitted or click the lookup button and select the appropriate zone.
- **Copies** — Enter the number of copies of the bid that must be submitted.

NOTES:



The *Synopsis* section determines the Commerce Daily (CBD) or Electronic Posting System (EPS)/Fed Biz Opps actions.

??	**Synopsized**	Select this checkbox if the action was published in the CBD or Fed Biz Opps (FPS) when released.
??	**Date**	Enter the date the contract action was synopsized or click the calendar button and select the appropriate date.
??	**Transmitted Date**	Enter the date the action was sent to the CBD to be published or click the calendar button and select the appropriate date.
??	**Published Date**	Enter the date the contract action was published by the CBD or click the calendar button and select the appropriate date.
??	**Reason Not Synopsized**	If the contract action is not synopsized select the reason why it was not sent to the CBD or Fed Biz Opps (FPS) from the drop-down list.

Click **Submit** to save your changes or **Cancel** to return to the original document.

NOTES:

General

After a Solicitation has been created or opened, the above *Solicitation* page will open. It contains a Menu, *Solicitation Information* section, and a Summary or List section that changes according to the selection made on the Menu.

The *General Summary* page corresponds to the *General Summary* page displayed when creating a New Solicitation and also contains **Edit** buttons that can be used to edit most items. Differences in information listed here from that in the *Creating a New Solicitation* section above are as follows:

The *General* section contains the following system generated items:

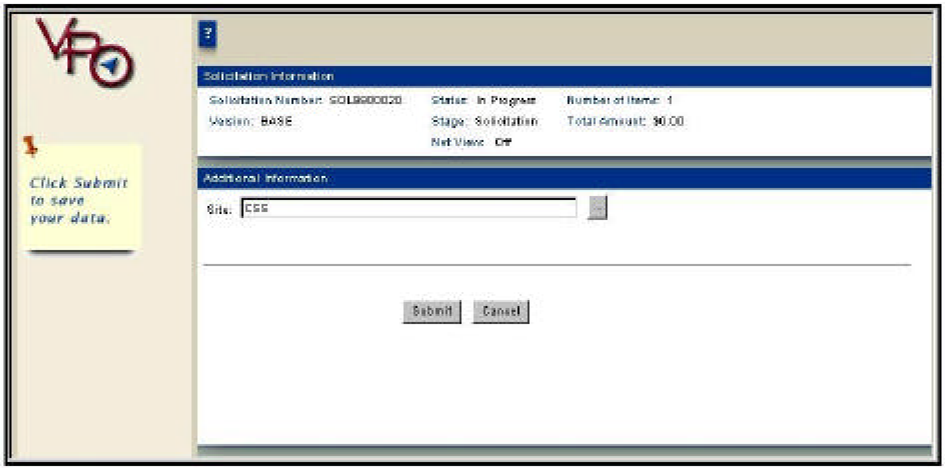
?? **Number of Vendors Solicited** This field will automatically fill with the total number of vendors that are on the vendors list. This item cannot be edited here, but must be changed from the **Vendor/Bidders List** option on the Menu.

?? **Number of Vendors Responded** Will automatically fill with the total number of vendors that responded to the solicitation. This item cannot be edited here, but must be changed from the **Vendor/Responses** option on the Menu.

The **Edit** button at the top of the *General* section allows all other items displayed in this section and in the *Bids Due,* and *Synopsis* sections to be edited.

NOTE: Depending on your agency setup, additional fields can display. Contact your System Administrator for definition of these fields.

NOTES:



Additional Information

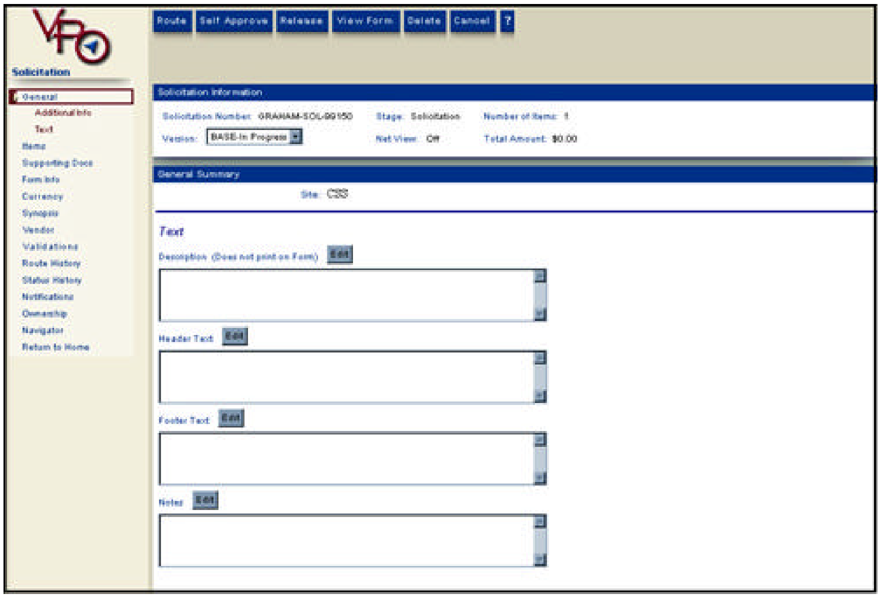
A new section, *Additional Info* is available either by selecting **Additional Info** under **General** on the Menu or scrolling down the page. It may contain the following fields:

- ?? **Site** — Defaults with the site the originator is assigned to, can be edited if necessary. Enter the site code or select from the drop-down list.

Click **Submit** to continue.

NOTE: Depending on your agency setup, additional fields can appear under *Additional Information*. Contact your System Administrator for definition of these fields.

NOTES:



Text

Another new section, *Text*, is available either by selecting **Text** under **General** on the Menu or by scrolling down the page. It includes the following items:

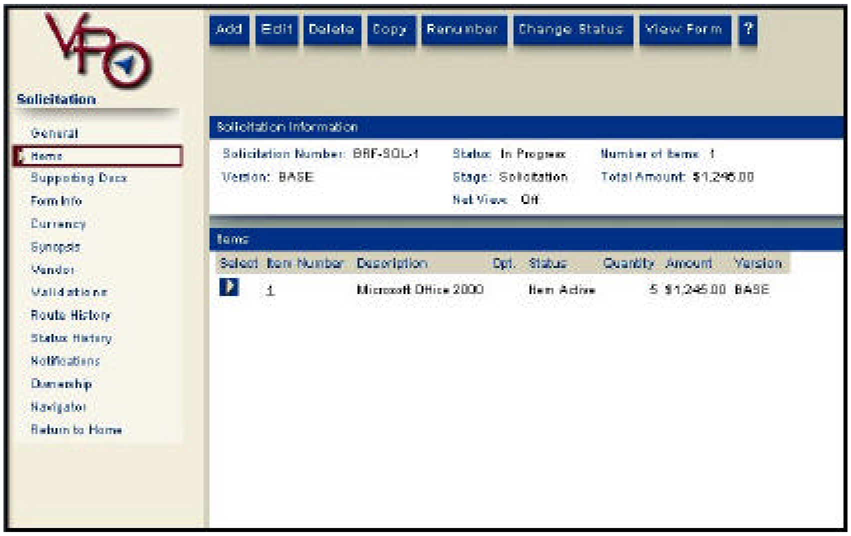
- **Description** — This item does not print on any form. Click **Edit** to add or change information.
- **Header Text** — Click **Edit** to add or change information. This will print as a header on the form.
- **Footer Text** — Click **Edit** to add or change information. This will print as a footer on the form.
- **Notes** — Click **Edit** to add or change information. Notes do not print on forms.

When selecting **Edit** for any of the four choices above, the page displayed will contain a **Statements** lookup button that will display standard choices for the item. A listed option may be selected, or original text may be added in the box provided.

Click **Submit** to save your data, or **Cancel** to return to the *General Summary* page.

NOTES:

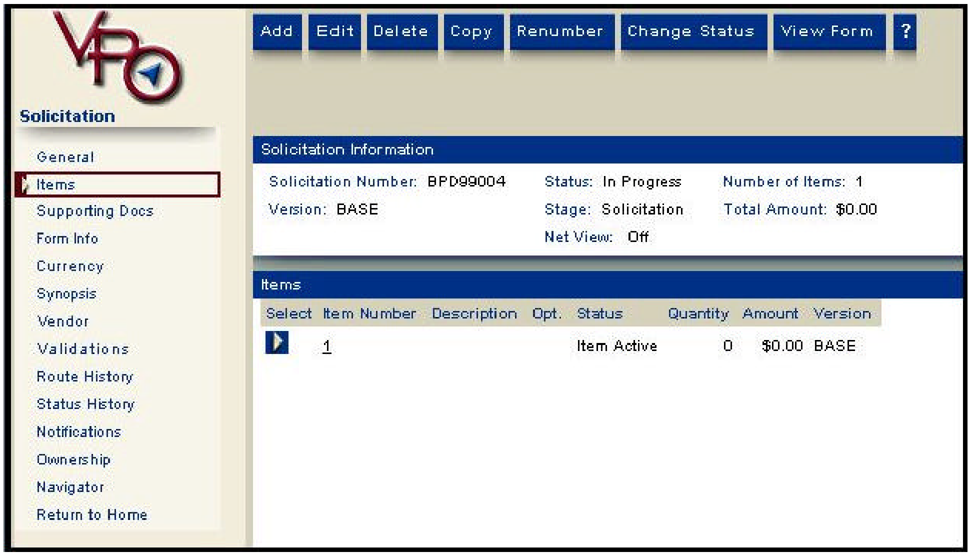
Items



The *Items* page is comprised of two sections, the *Solicitation Information* section discussed above, and the *Items* section that lists all line items that were selected when the solicitation was created, edited or amended. The following column headings appear:

- *Select* — A blue box with an arrow indicates the item selected. Click on this box to select an item for editing.
- *Item Number* — Click on this hyperlink to select an item.
- *Description* — A description of the item. This description will print on the requisition, award, and solicitation forms next to the line item number.
- *Opt.* — Indicates whether the item/service will be exercised in future fiscal years. If not, it will be blank.

NOTES:



?? *Status* — This is the current status of the line item. To change the status of a line item, select it and then click **Change Status**. Status designations include:

Item Active: Indicates that item is available for further procurement action.

Item Inactive: Indicates that the item is removed from further procurement action. Does not affect funds commitment or encumbrance.

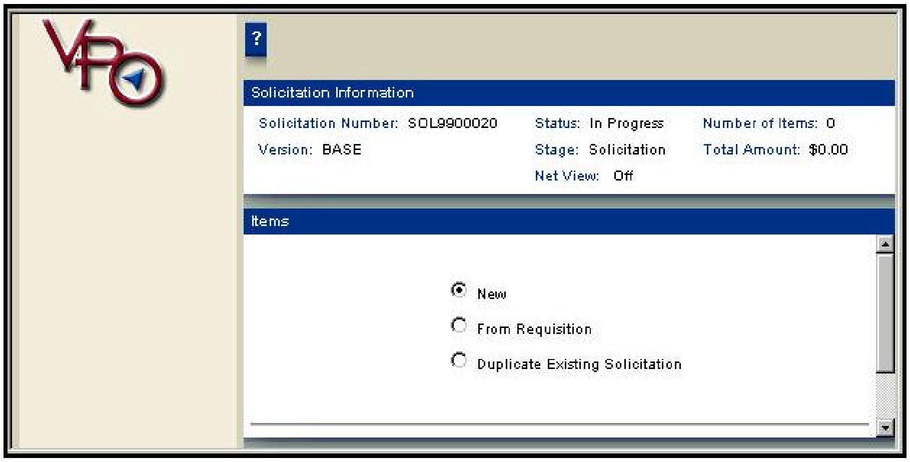
Canceled: Decommits or unencumbers funds associated with the line item and prevents further procurement action.

?? *Quantity* — The quantity of that item.

?? *Amount* — The total dollar amount for that item.

?? *Version* — There can be multiple versions of a document. A designation of Base indicates that this is the original document. If amendments have been created, then the amendment number would appear.

NOTES:



Adding a Line Item

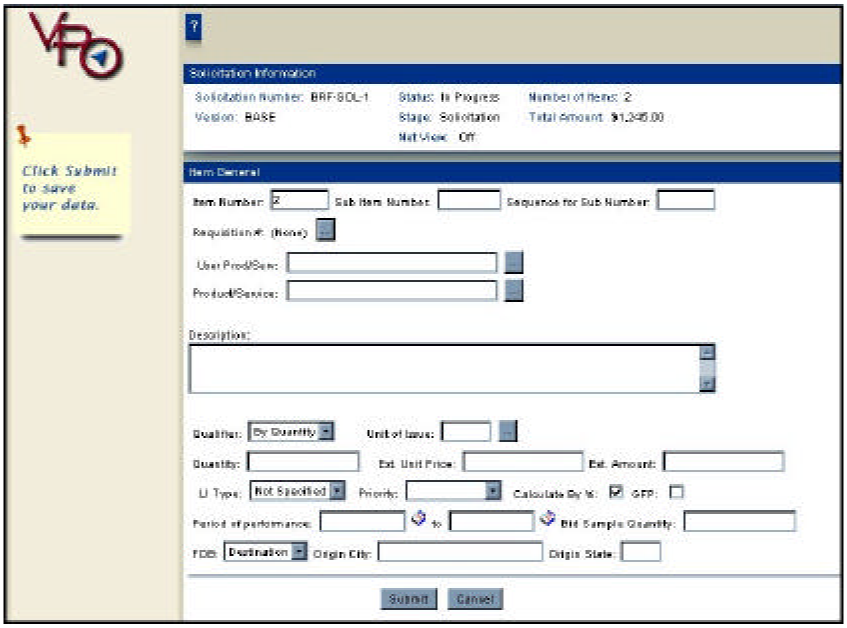
Click **Add** to add line items to the solicitation. The page that opens includes the following options:

?? **New** Creates an entirely new item. The *Item General* page will display.

?? **From Requisition** Opens a *Create Solicitation from Requisition* page where available requisitions may be viewed and selected by line item or as a whole. After making a selection the *Item General* page will display. Refer to Selection Lists section of the Introduction module for a further discussion of selecting a document.

?? **Duplicate Existing Solicitation** Opens the *Solicitation Selection* page where available solicitations may be viewed and selected After making a selection the *Item General* page will display. Refer to Duplicating a Solicitation.

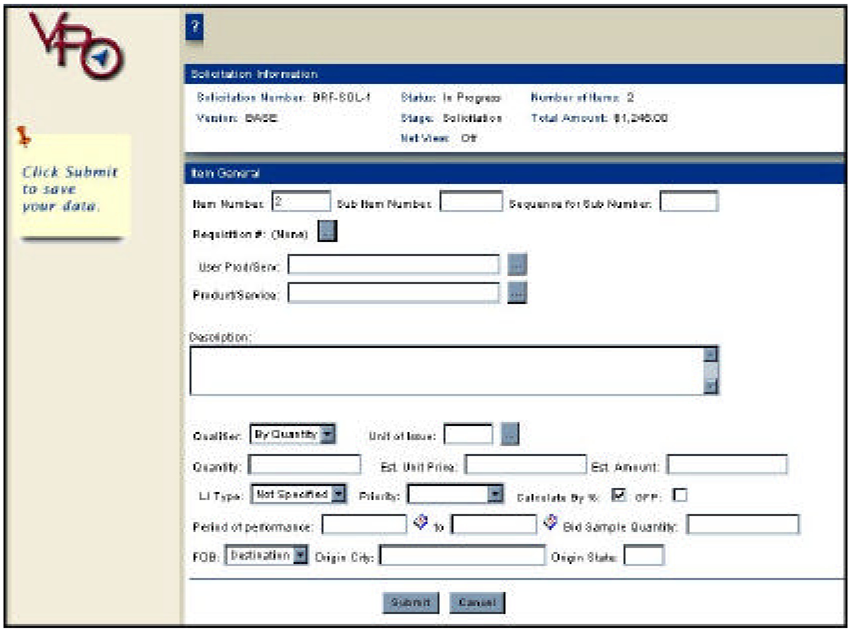
NOTES:



After the item is created the *Items General* page will display. The following fields appear on the *Items General* page:

- **Item Number** — Displays an automatically generated sequential number that may be edited. This field is required.
- **Sub Item Number** — A sub item number can be entered as needed.
- **Sequence for Sub Number** — The sequence for the sub number can be entered as needed. If a sub number is entered, the sequence number must be greater than 0.
- **Requisition #** — This field is used to list the requisitions that are associated with this solicitation. The associated requisition can be changed by clicking the lookup button to display the *Requisition Selection* page where a requisition, or a line item from a requisition may be selected. Click **Submit** to select or **Cancel** to return to the *Items General* page. If no requisition is selected, the display will show (None).

NOTES:

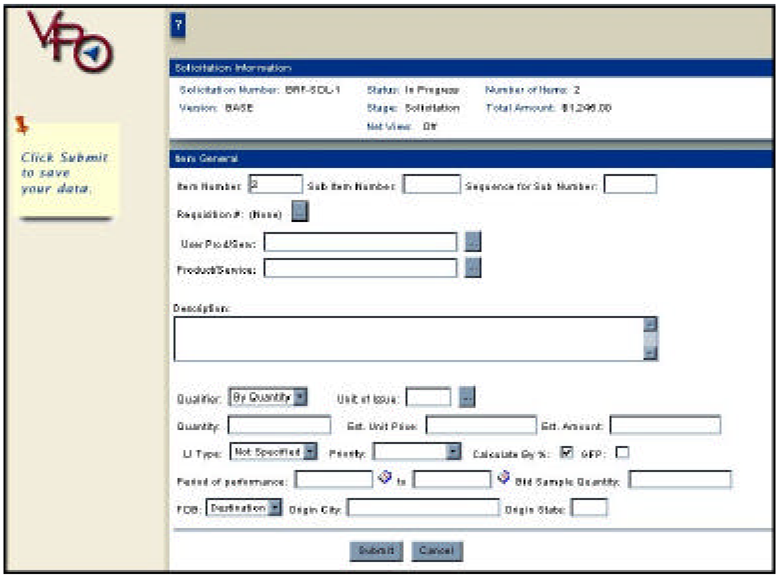


?? **User Prod/Serv** — Enter the User Prod/Serv Code or click the lookup button to display the *User Prod/Serv Code Selection* page. This code is agency specific. Click the item hyperlink or enter your criteria in the *Search* section and click **Display** to make a selection, or **Cancel** to return to the *Items General* page. If a selection is made here and information has been set up for the Product/Service Code, the **Product/Service** information on the next line will display, but can still be edited.

?? **Product/Service** — Displays the code used to identify the service/product being ordered. Product/Service codes are the four character codes used to report to the Federal Procurement Data System (FPDS). PRISM is delivered with a database of current FPDS product codes. Enter the code or click the lookup button to display the *Product/Service Code Selection* page. Select a code or click **Cancel** to return to the *Items General* page.

?? **Description** — Enter a description of the line item. This description will print on the requisition, award, and solicitation forms next to the line item number.

NOTES:



?? **Qualifier** — Select from the drop-down list to indicate the way the line item is being ordered. **By Quantity** is the desired number of items, usually goods, being ordered. If this option is selected, the **Unit**, **Quantity**, and **Est. Unit Price** fields must be filled in. **By Dollars** will base the solicitation on the desired dollar amount, usually services, to spend. If this option is selected the **Est. Amount** field must be filled in.

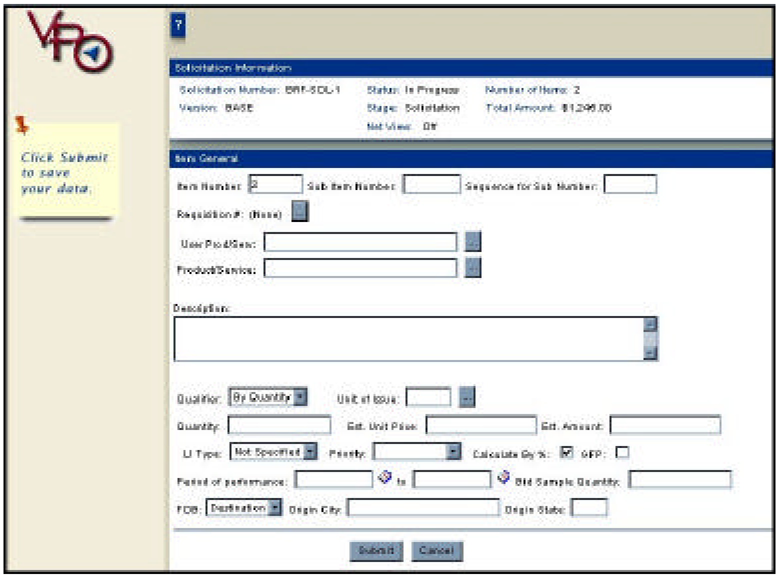
?? **Unit of Issue** — Enter the Unit of Issue or click the lookup button to display the *Unit of Issue Selection* page. Click the hyperlink beside the code desired or click **Cancel** to return to the *Items General* page.

?? **Quantity** — Enter the quantity being ordered. This field must be completed for a **By Quantity** item.

?? **Est. Unit Price** — Enter the estimated unit price of the item being added. This field must be completed for a **By Quantity** item.

?? **Est. Amount** — Enter the estimated amount of the cost of this item. Required for a **By Dollars** item.

NOTES:



?? **LI Type** Select Travel, Material, Labor, Freight or Unspecified from the drop-down list.

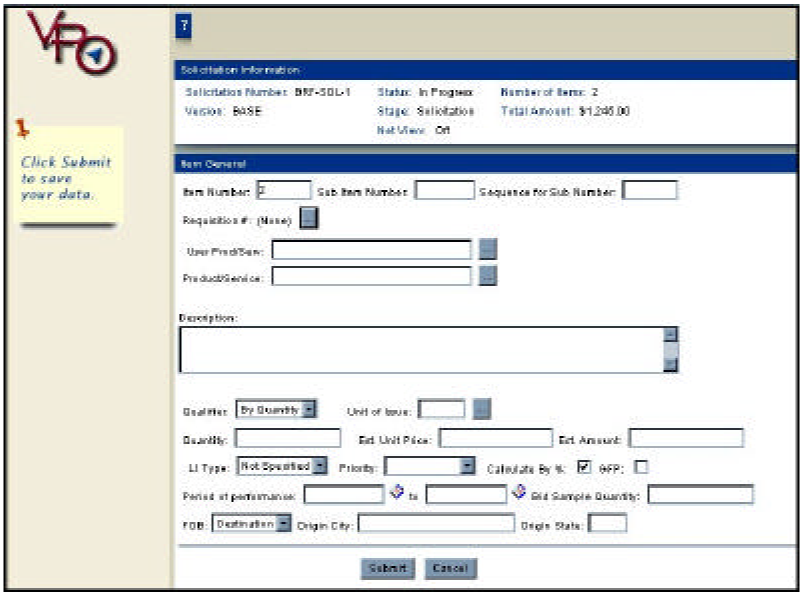
?? **Priority** Select from the drop-down list. This list is agency maintained.

?? **Calculate by %** If checked, the cost of the item will assigned to the specified Accounting Codes by percentage when spread across multiple accounting codes. Otherwise it will calculate by dollar amount or quantity.

?? **GFP** Select the **GFP** checkbox to label an item as Government Furnished Property. If selected, the value of that item will not be obligated or encumbered at the time of the award.

?? **Period of Performance** Enter the beginning and ending dates of the Period of Performance, of click the calendar button and select the dates.

NOTES:



?? **Bid Sample Quantity** — Enter the number of items ordered as bid samples.

?? **FOB** — Select Unknown, Destination or Origin from the drop-down list. Free/Freight On Board (FOB) information indicates whether the vendor or agency is responsible for shipping costs. **Destination** indicates the originator pays the cost. **Origin** indicates the recipient pays the costs. If the FOB is Origin, the **City** and **State** fields below are required.

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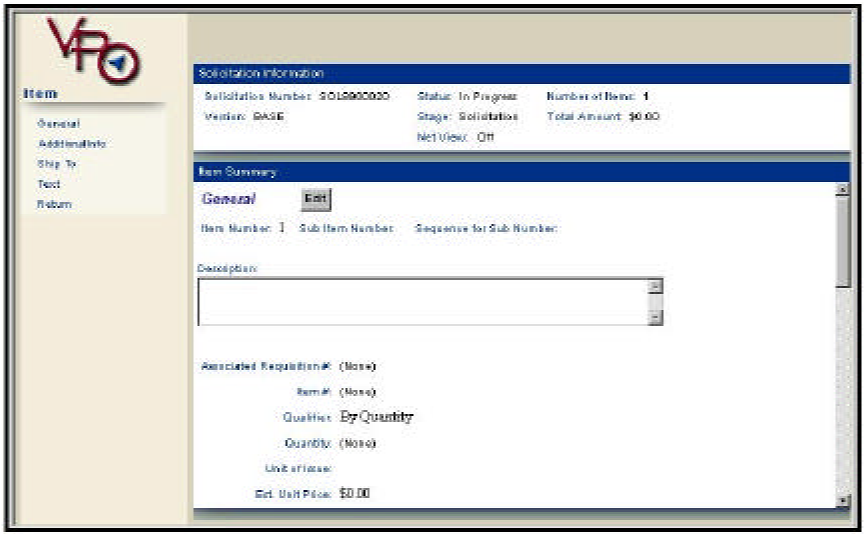
?? **Origin City** — If **FOB Origin** is selected, enter the city from where the items are being shipped.

?? **Origin State** — If **FOB Origin** is selected, enter the state from where the items are being shipped.

When the above data has been completed, click **Submit** to save your data, or **Cancel** to return to the *Item Summary* page without saving your data.

NOTE: Depending upon your agency's setup, additional fields may be displayed. Contact your system Administrator for information concerning these fields.

NOTES:



The *Item Summary* page will now display. This page is divided into four sections. Each section displays the information entered previously and may be edited by clicking the **Edit** button at the top of the section. Each section may be reached by clicking the section name on the Menu or scrolling down the page.

?? **General** Displays information entered on the *Items General* page. Refer to the above listing on the *Item General* page. Click **Edit** to return to the *Items General* page for editing.

NOTES:

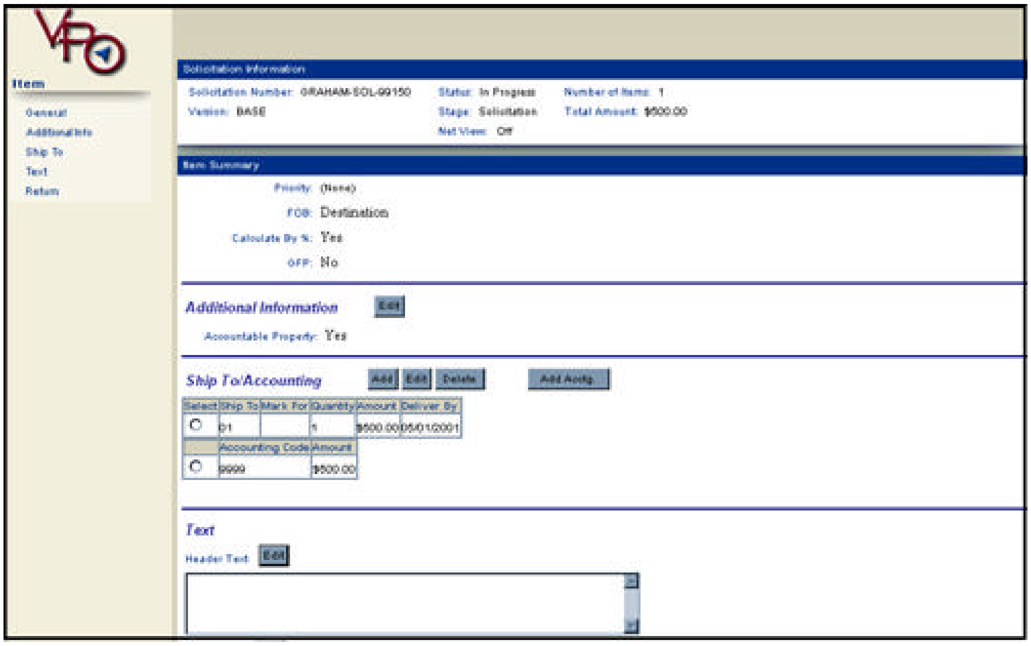
Additional Information

Click **Edit** to display the *Additional Info* page. The following fields may display:

- **Accountable Property** — If your agency has an interface with an external property tracking program, this checkbox is used to mark the line item for export to that program. PRISM defaults with the checkbox selected. If you do not have an interface, the checkbox has no effect but may be used for reporting purposes.

NOTE: Depending on your agency setup, additional fields may display. Contact your System Administrator for definition of these fields.

NOTES:



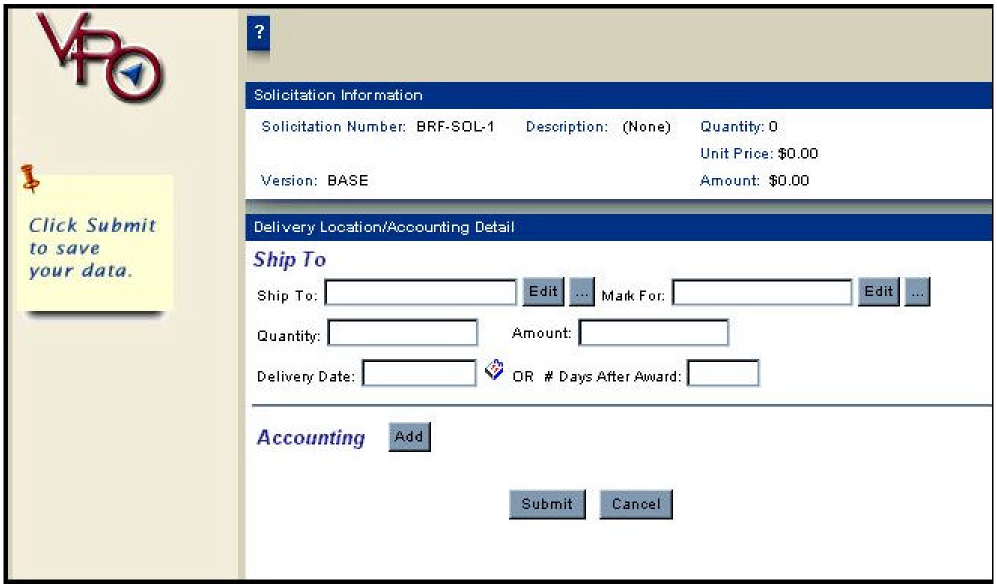
Ship To/Accounting

This section lists the shipping and accounting information entered for this item. **Add**, **Edit**, **Delete**, and **Acctg.** buttons appear at the top of the section.

To edit existing information, select the option button beside the desired location and click **Edit**.

To delete delivery locations, select the option button and click **Delete**. A confirmation page will appear.

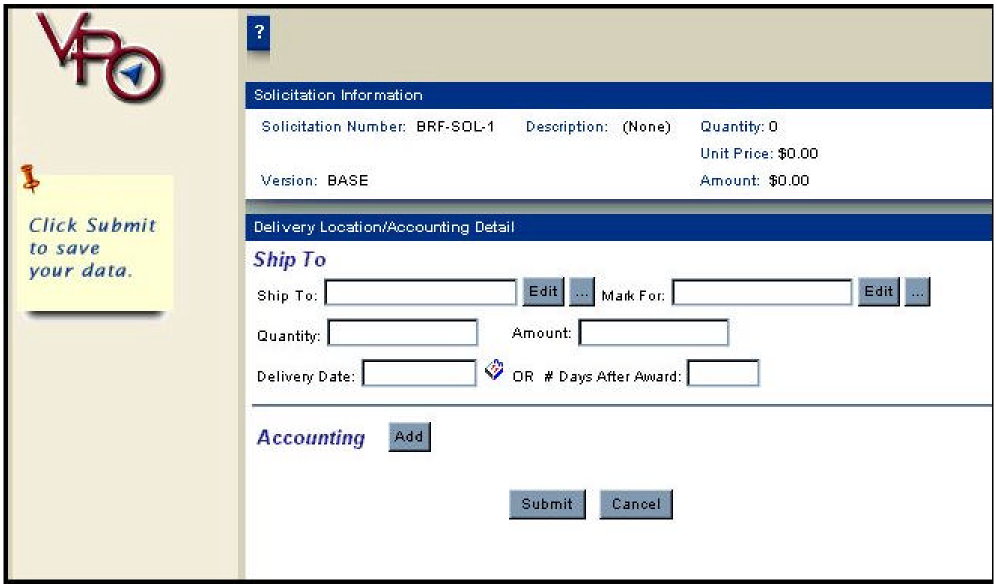
NOTES:



To add delivery information and accounting data, click **Add** in the *Ship To/Accounting* section of the *Item Summary* page. The *Delivery Location/Accounting Detail* page will display. The following fields are included in the *Ship To* section of the page:

- **Ship To** — Displays the code used to identify the address where the service/products are to be delivered. The lookup button displays a listing from the PRISM database. Click **Edit** to make changes to the **Ship To** information. Changes will only affect this solicitation and will not change the PRISM database.
- **Mark For** — Displays the code used to identify the ultimate location where the service/products should be delivered once they have been received at the Ship To location. Click **Edit** to make changes to the **Mark For** information. Changes will only affect this solicitation and will not change the PRISM database.

NOTES:

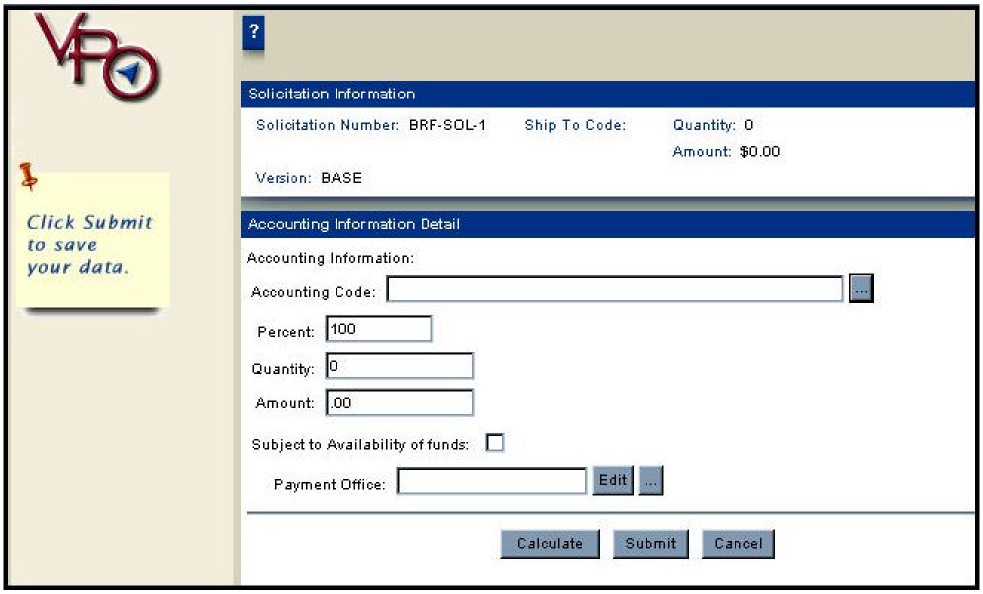


?? **Quantity** Displays the quantity entered when the line item was created. This field can be edited.

?? **Amount** System generated field based on item cost and quantity entered. If this is a "by dollar" line item this field can be edited. If this is a "quantity" line item this field cannot be edited.

?? **Delivery Date/ Days After Award** Displays the date the product/services are due for delivery. Enter a specific date in the **Delivery Date** field or the number of **Days After Award**.

NOTES:



Click **Add** to open the *Accounting Information Detail* page. The following fields are displayed:

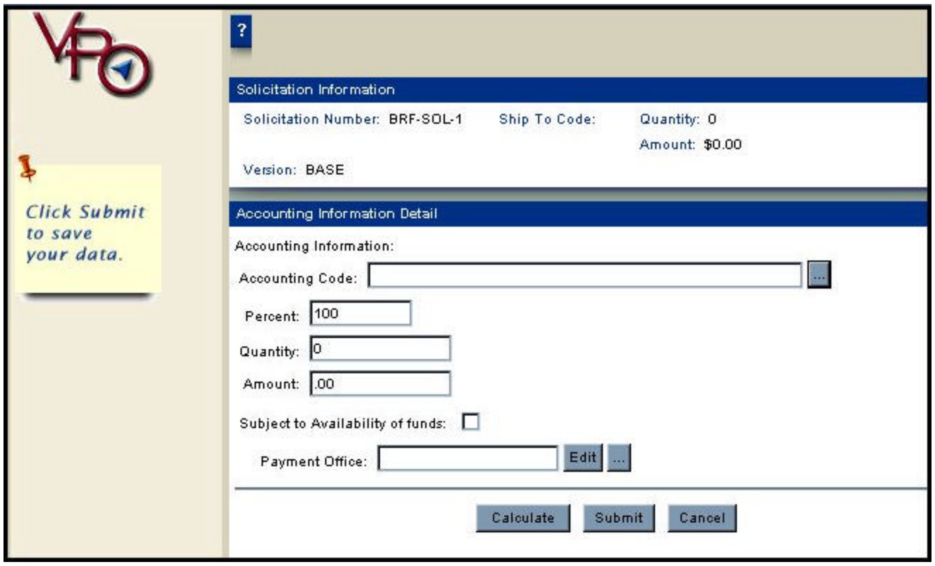
?? **Accounting Code** Click the lookup button to select an Accounting Code.

?? **Percent** Enter a percentage of the dollar amount of the item that is being assigned to the current accounting code. This percentage will display in the Percent column above this field.

?? **Quantity** System generated based on original line item creation. If **Calculate by %** is not checked on the *Item General* page, user can enter data.

?? **Amount** System generated based on quantity. This item can be edited if line item is “by dollar”.

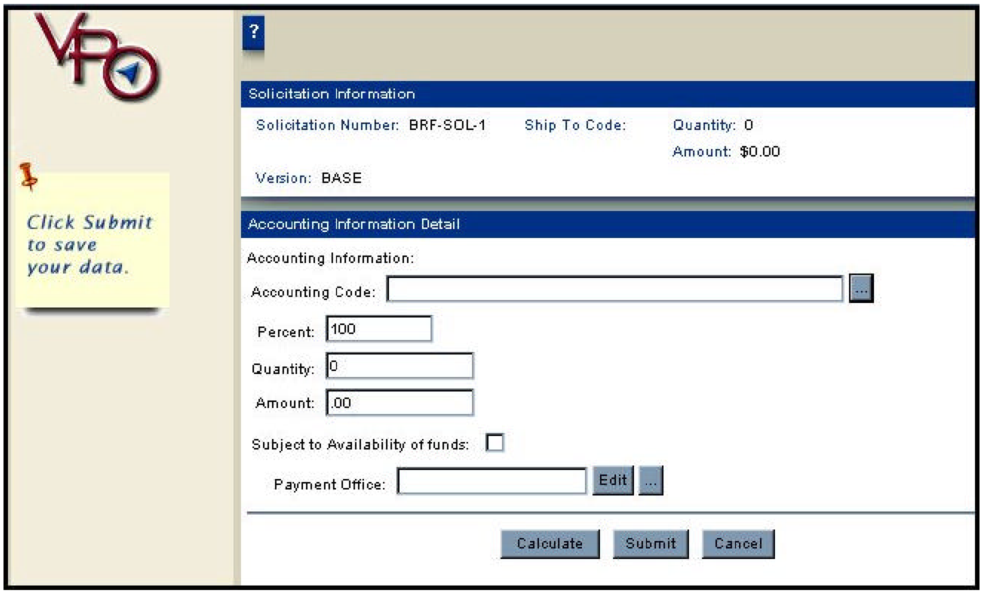
NOTES:



?? **Subject to Availability of Funds** — Select this checkbox if the agency does not currently have the funding for the amount assigned to the accounting string. If selected, the value of this item will not obligate or encumber funds at the time of the award. This may be changed later on the award or by an amendment.

?? **Payment Office** — Displays the code used to identify the location where payment will be made. The lookup button displays a list of available locations. This information may be edited for this solicitation.

NOTES:

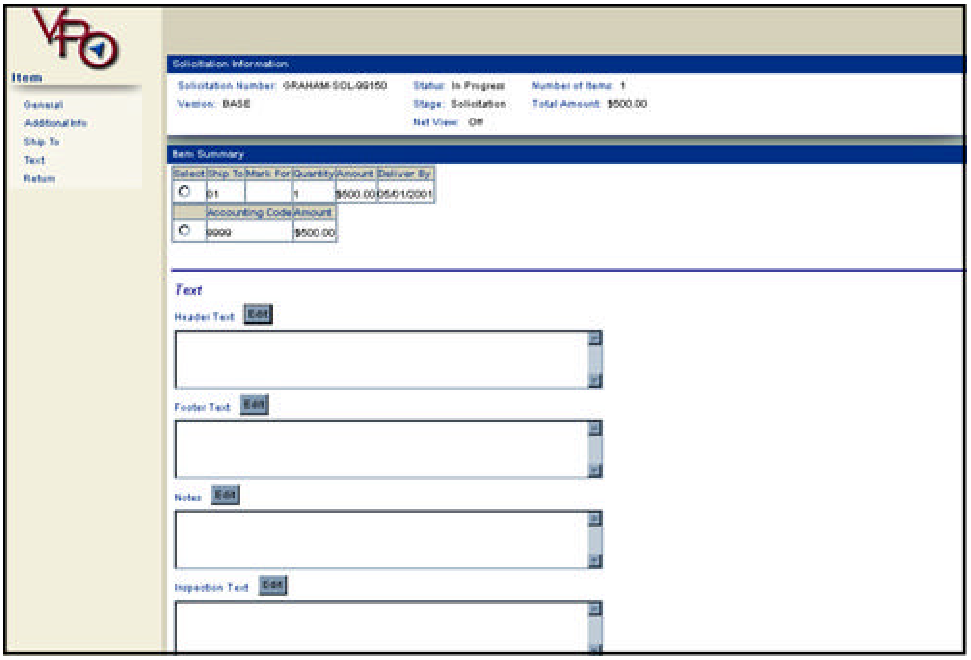


Up to thirty additional accounting fields may be displayed. The titles of the additional fields are determined by your agency, as is the information required for each field. Contact your System Administrator for details on these fields.

When all Accounting Information has been completed, click **Calculate** to calculate the amount field. Click **Submit** to save your data, or **Cancel** to return to the *Delivery Location/Accounting Detail* page.

When all information for shipping and accounting has been completed, click **Submit** to save or **Cancel** to return to the *Item Summary* page without saving your data.

NOTES:



Text

Click **Text** to display the *Text* section that includes the following fields. Each field has an **Edit** button that will allow text to be entered or edited.

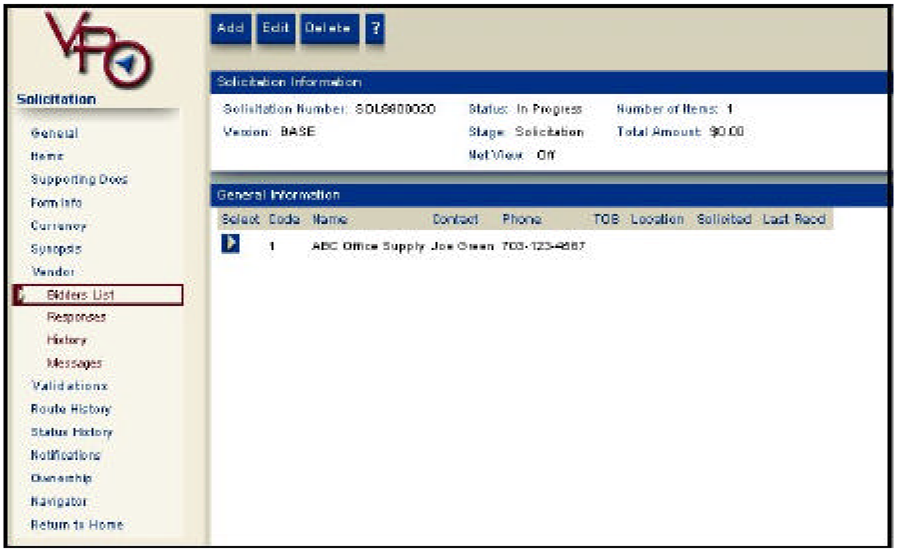
- **Header Text** Enter text that is to print before the line item description.
- **Footer Text** Enter text that is to print following the line item description.
- **Notes** Enter any notes about the line item. These are similar to Post-it notes and will not print on any form.
- **Inspection Text** Enter text about this line item that will be carried forward and viewed at the time of receiving.

In each field above, click **Submit** to save text and **Cancel** to not save and return to the *Item Summary* page.

When all items have been entered, click **Return** on the Menu to return to the *Items* page.

NOTES:

Vendor



Click **Vendor/Bidders List** to display the *General Information* page listing the solicited vendors. The columns displayed include:

?? *Select* — A gold arrow in a blue box indicates the selected bidder.

?? *Code* — A system generated bidder number. When underlined, this is a hyperlink to this bidder.

?? *Name* — Displays the name of the bidder.

?? *Contact* — Displays the name of the contact at the bidder company.

?? *Phone* — Displays the phone number of the above contact.

NOTES:

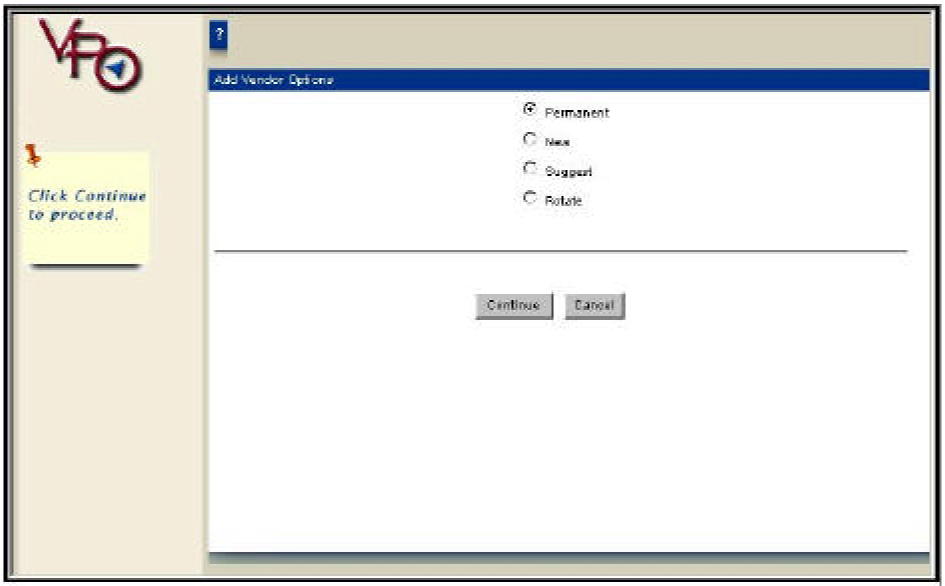
?? *TOB* — Displays a code number indicating the type of business for the vendor (i.e. manufacturer etc.).

?? *Location* — Displays any optional criteria the vendor may be required to meet.

?? *Solicited* — Displays the date the solicitation was issued to this vendor.

?? *Last Received* — Displays the last date a response was received from the bidder.

NOTES:



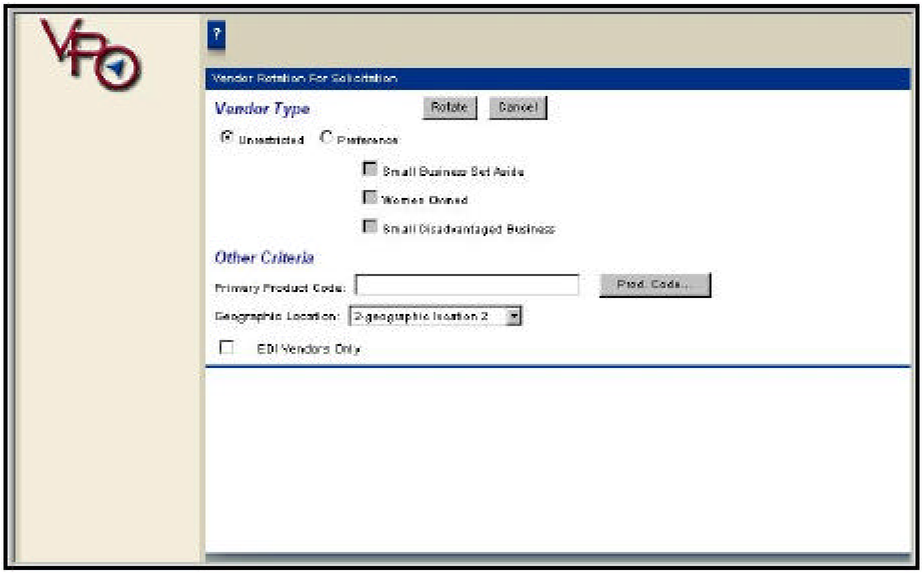
Adding a Vendor to the Bidders List

If a vendor is not displayed, a vendor can be added to the vendor list by clicking **Add** to open the *Add Vendor Options* page. The options given are as follows:

- **Permanent** — Provides a means to search the Prism database for existing vendors. Click to open the *Vendor Selection* page. Select from the hyperlink in the Code column of the desired vendor or search by other criteria and click **Display**.
- **New** — Click to open the *Temporary Bidder* page. Refer to Add a Temporary Vendor.
- **Suggest** — Click to open the *Vendor Selection* page. Those vendors suggested on the associated requisition, if any, will display. Select a vendor using the hyperlink on the left.
- **Rotate** — Refer to Vendor Rotation.

Click the option button for your selection, the click **Continue** to continue or **Cancel** to return to the **Bidders List** page.

NOTES:



Vendor Rotation

After all information has been entered on the solicitation, the vendors can be rotated and/or a vendor list can be created. Vendor rotation will search for all vendors in the PRISM database that meet the specified search criteria.

Click **Add** and select **Rotate** to open the *Vendor Rotation For Solicitation* page. This page displays the specified criteria the vendor must meet to be considered for the solicitation. The fields are as follows:

?? **Vendor Type:**
 ?? **Unrestricted/ Preference** — These option buttons determine the vendor type. If **Preference** is selected, three check boxes will be available, and one or more of the checkboxes must be selected.

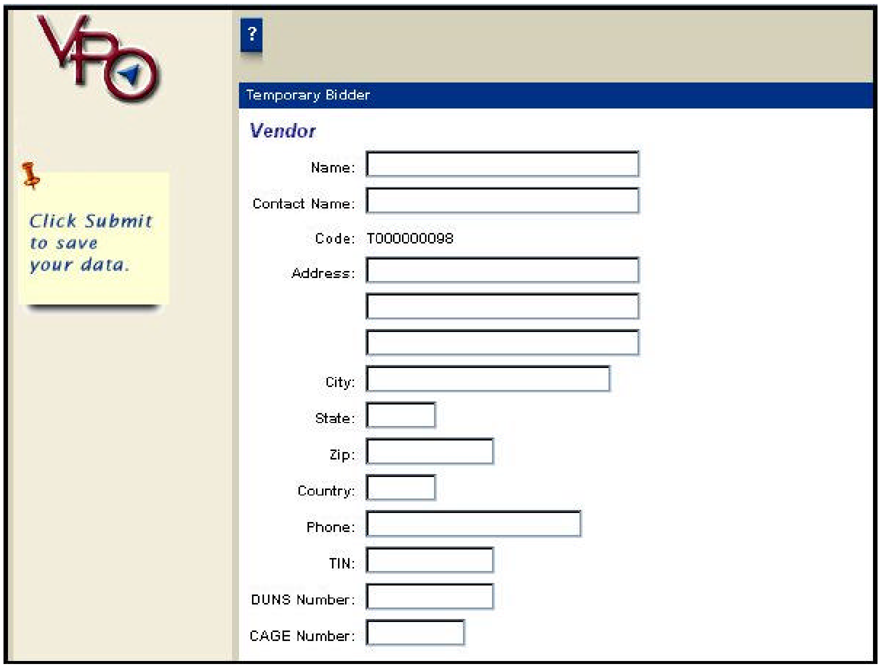
?? **Other Criteria:**
 ?? **Primary Product Code** — A primary product code must be selected. Choose from the list provided by the System Administrator or click the lookup button to select from the complete listing of codes.

 ?? **Geographic Location** — An optional criterion the vendor may be required to meet. Normally used for a service the vendor is delivering, such as a catering service.

 ?? **EDI Vendors Only** — If selected, requires that the vendors must be EDI participants.

Once the criteria for the rotation has been entered, click **Rotate**. All vendors that meet the requirements and are not already on the vendor list will be displayed. Select the vendor you want to add and click **Select**.

NOTES:



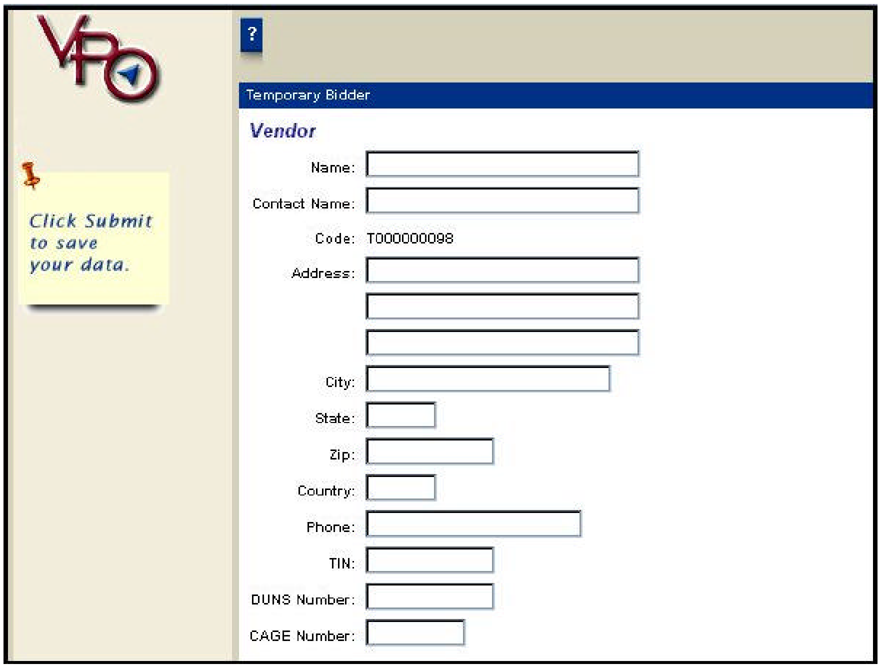
Adding a (New) Temporary Vendor

Select the **New** option button to add a temporary vender. The *Temporary Bidder* page will display. This page is divided into two sections, *Vendor*, and *EDI*. The fields displayed are as follows:

The fields in the *Vendor* section are:

- **Name** — Used to identify the vendor company.
- **Contact Name** — Name of the primary vendor contact.
- **Code** — A system generated temporary bidder number.
- **Address/City/ State/Zip/County** — The business address for the temporary bidder.
- **Phone** — The phone number of the person who should be contacted with questions or concerns.

NOTES:

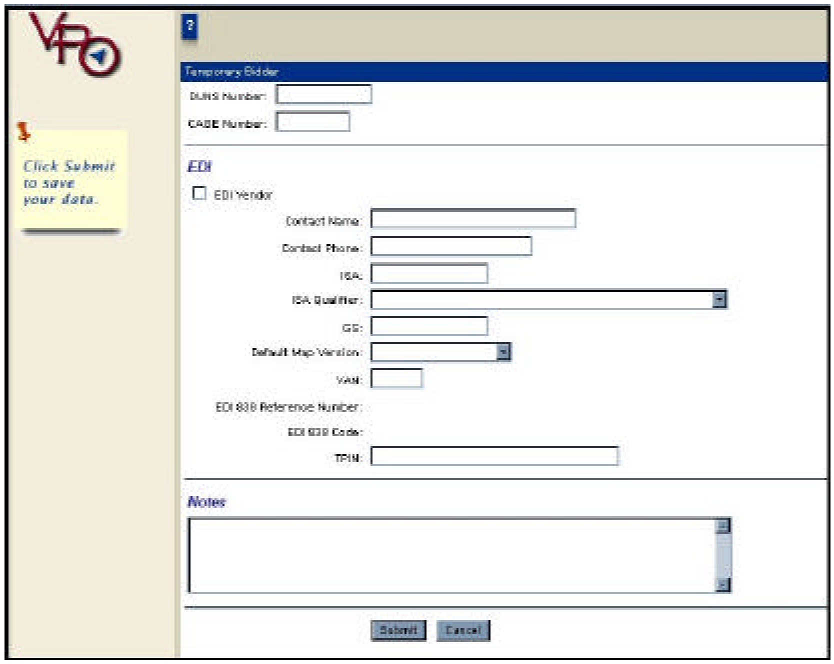


?? **TIN** Tax Identification Number used when taxes are reported.

?? **DUNS Number** Dun and Bradstreet Information Services number assigned to the vendor.

?? **CAGE Number** Commercial and Government Entity number used by DoD agencies.

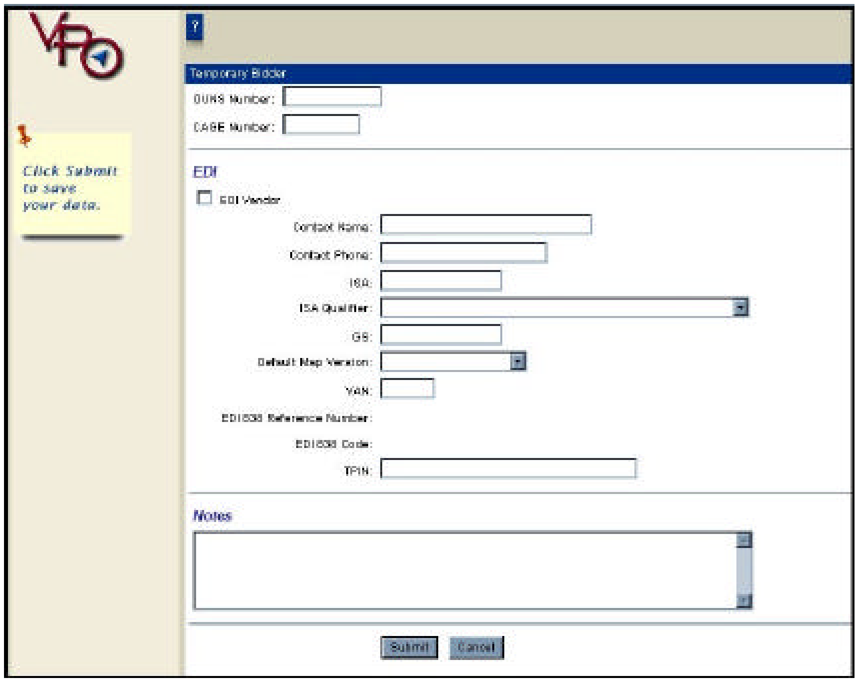
NOTES:



The following fields appear in the *EDI* section:

??	**EDI**	If the vendor is an EDI participant, select the EDI checkbox and the following fields become available.
??	**Contact Name/Phone**	Name and phone number of the person to be contacted for EDI questions.
??	**ISA**	The EDI address used for routing EDI transactions.
??	**ISA Qualifier**	Determines the format of the Interchange Segment Address (ISA) field. Select from the drop-down list.
??	**GS**	The EDI address used for routing EDI transactions.
??	**Default Map Version**	Select from the drop-down list.

NOTES:



?? **VAN** The Value Added Network (VAN) used by the vendor to receive EDI transactions.

?? **EDI 838 Reference Number** System generated number of the 838 (vendor profile) transaction.

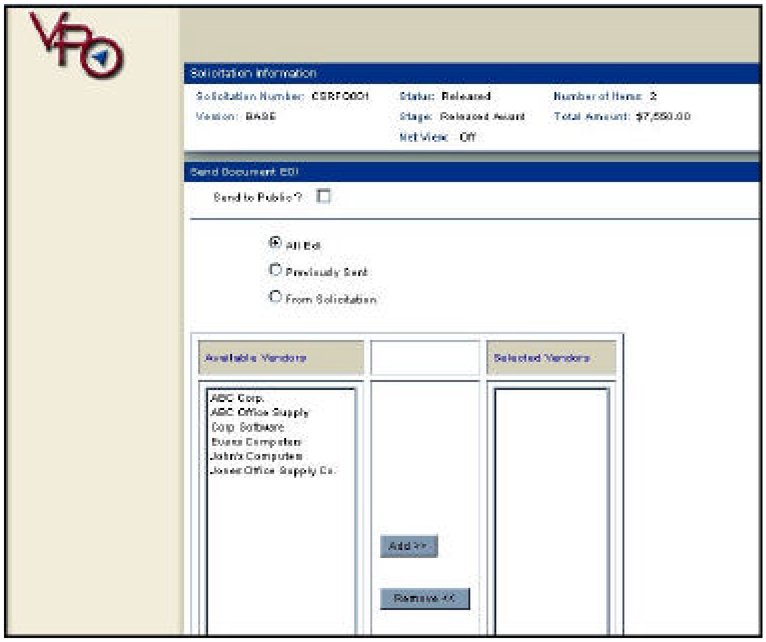
?? **EDI 838 Code** System generated number of the 838 (vendor profile) transaction for the vendor.

?? **TPIN** The Trading Partner's Identification Number (TPIN) administered by the central contract agency.

?? **Notes** A text box for entering general notes or comments.

Complete the requested data, and then click **Submit** to add this bidder or **Cancel** to return to the *General Information* page.

NOTES:

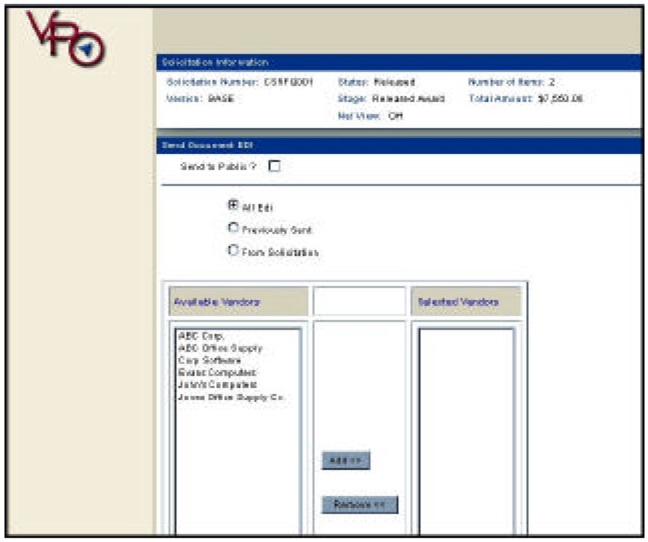


Issuing a Solicitation via EDI

To issue a released solicitation via EDI, click **Vendor** and then click **EDI** on the toolbar. The *Send Document to the EDI* page will display. The information in this window determines which EDI vendors will receive the solicitation. This will affect what is displayed in the *Available Vendors* section*:*

- **Send to Public?** If selected, all EDI vendors, whether they are in the PRISM database or not, will have access to the solicitation when it is posted on the Value Added Network (VAN).
- **All EDI** If selected only the EDI vendors in the PRISM database will appear in the *Available Vendors* section.
- **Previously Sent** Select to see a list of vendors the solicitation has already been sent to.
- **From Solicitation** Select to display the vendors that were added to the solicitation bidders list.

NOTES:



Once the vendors are displayed in the *Available Vendors* section, select the vendors desired and click **Add** to transfer them to the *Selected Vendors* section. To remove vendors from the *Selected* section select the vendor and click **Remove**. When the list is finalized, click **Send**. Validations will then be performed on the solicitation and an error and warning report will display. If there are no errors or warnings the message will read “No Errors Found. Document Was Successfully Sent.”

After a solicitation has been released, a vendor can still be added to the vendor list. From the *Vendor/Bidders List* page add the vendor to the list following the initial distribution and then select the vendor and click **Issue**. The date for the solicitation for that vendor will be displayed on the vendor list.

NOTES:

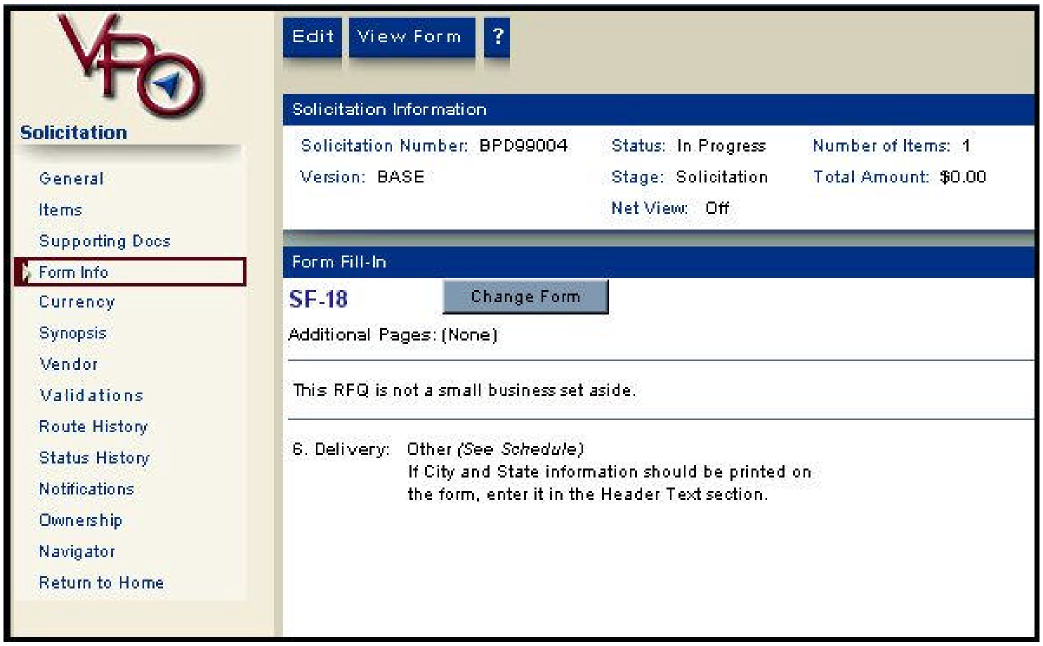
Supporting Docs

Click **Supporting Docs** to display a list of all attachments and supporting documents. Supporting documents included in this section are non-PRISM files that are associated with the current document. They include documents such as a statement of work, blueprints, spreadsheets, etc. These documents are usually attached to help reviewers and approvers understand the request. Refer to the Inbox, Preferences, and Documents Module for further information.

Refer to Reference – Toolbars by Menu Options for a complete list of available toolbar options.

NOTES:

Form Info



Click **Form Info** to select or edit a form to be printed. In this section, you can select the agency form you'd like to use for the solicitation and complete any additional fields that may be required. Once a form has been selected, only that form will display when you print. If you want to change forms, you must return here.

Refer to the Forms module for information about filling out the forms.

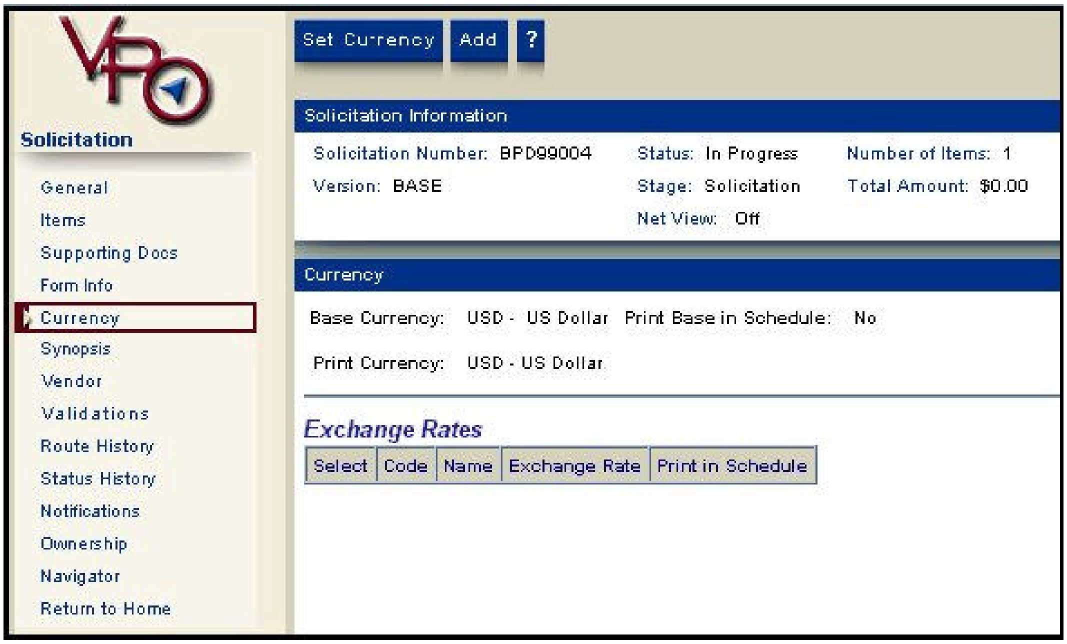
Depending upon the document status and your access rights, the blue toolbar may include:

?? **Edit** Click to make changes to the information on the form.

?? **View Form** Displays the data on the actual form. The document can also be printed from this area. This option requires that Adobe Acrobat Reader is installed on your hard drive. Acrobat reader is available free from www.adobe.com. If you have questions about whether it is installed or how to install it, see your System Administrator.

NOTES:

Currency



Currency displays the current Base Currency information for the solicitation. If the solicitation was created from New, the Base Currency would come from the user's site as set up by the System Administrator. If a solicitation was created by duplication or modification the Base Currency is brought forward from the original document. If this is a modification to a solicitation then the Base Currency is not changeable.

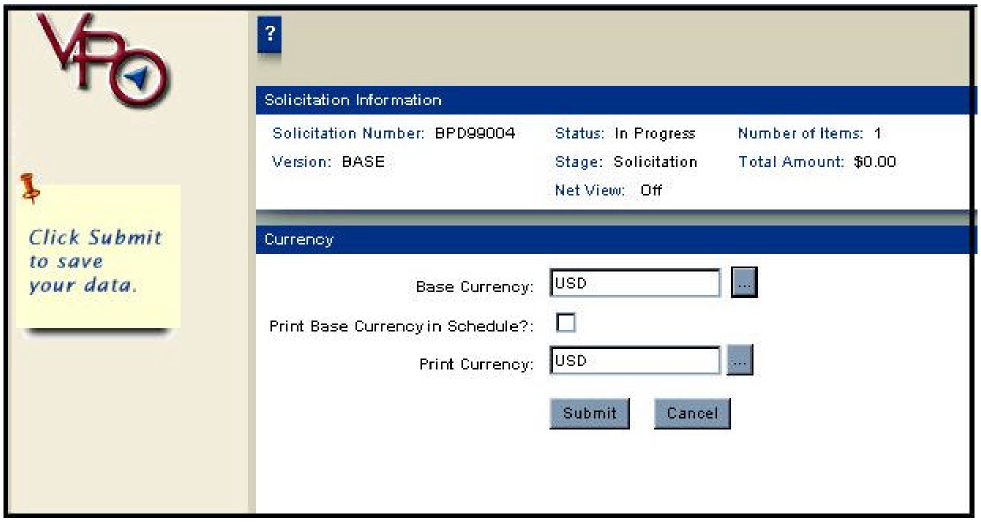
According to the agency and your user profile you may be able to change currency information here. Any exchange rate entered here will only be applicable to this document. It does not affect any rates entered by the System Administrator.

Depending upon the document status and your access rights, the blue toolbar may include:

?? **Set Currency** Click to make changes to the currency information.

?? **Add** Click to display the *Document Exchange Rate* page to change or add information.

NOTES:



Setting Base Currency

Click **Set Currency** to make changes to the currency information. The following fields may be available:

- **Base Currency** — Enter or select the lookup button and select from the list provided.
- **Print Base Currency in Schedule?** — Select the checkbox to print the base currency in schedules.
- **Print Currency** — Enter or use the lookup button to select from the list provided if other than the base currency is to be printed. The selections for Print Currency are limited to the document's Base Currency and any Target Currencies that have been added with Exchange Rates.

NOTES:

Adding or Editing Exchange Rates

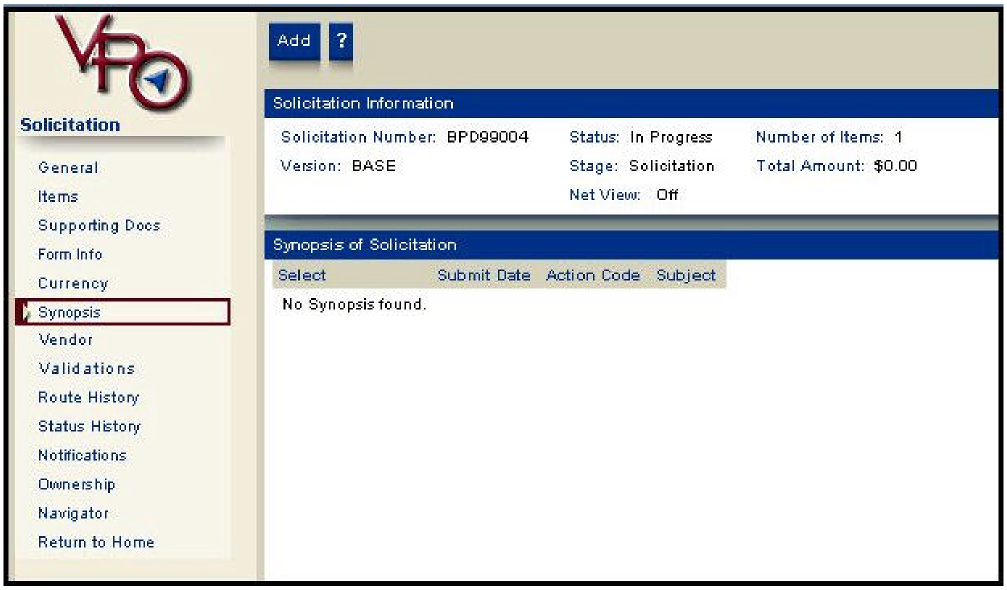
Click **Add** to display the *Document Exchange Rate* page add information. The following fields appear:

- **Base Currency** The default currency will display.
- **Target Currency** Select the lookup button to change the currency used. Select from the list.
- **Exchange Rate** Any exchange rate entered here will only be applicable to this document. It does not affect any rates entered by the System Administrator.
- **Print In Schedule** Click the checkbox if you want the currency information to print.

On the **Currency** main page, select an exchange rate and click **Edit** to make changes to previously entered information, or **Delete** to remove the exchange rate selected.

NOTES:

Synopsis

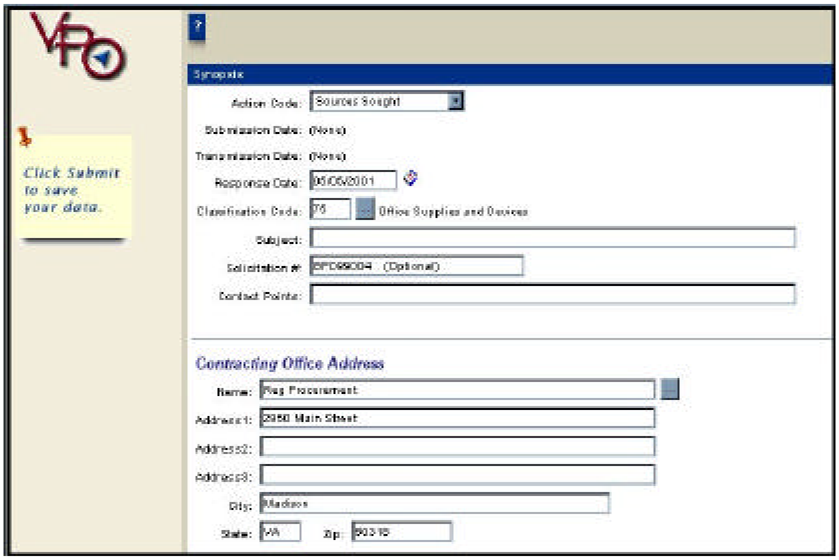


If the solicitation has been synopsized, the details will be displayed here. If not, the report will be No Synopsis found.

The following options may appear on the blue toolbar:

??	**Add**	Click to add new synopsis information.
??	**Edit**	Click to change information on an existing synopsis if the synopsis has not been transmitted. If the synopsis has been transmitted, the information will be displayed as view only. No information can be changed and the synopsis cannot be deleted.
??	**Delete**	Click to remove a synopsis. Once a synopsis has been transmitted it cannot be deleted.

NOTES:

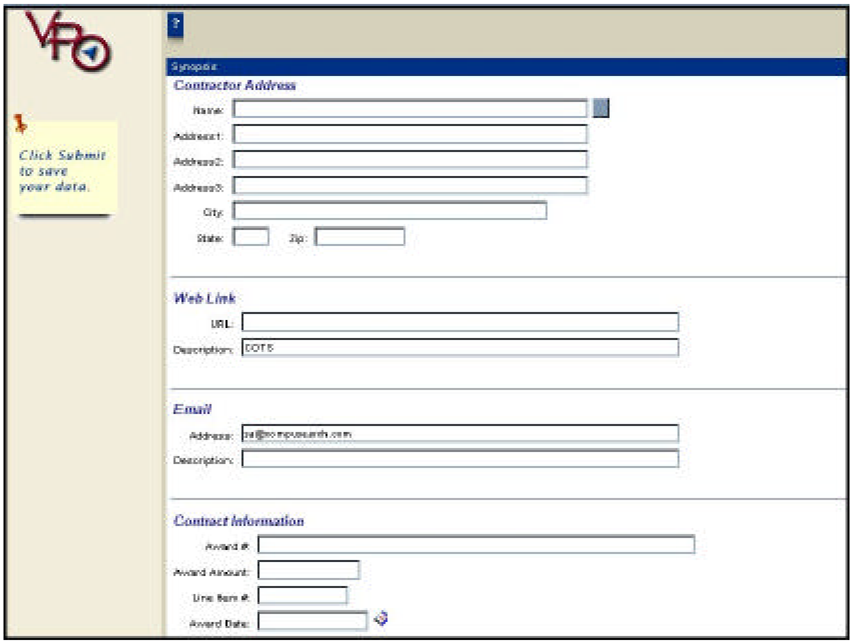


Adding a Synopsis

Click **Add** to add synopsis information to the solicitation. When it is completed, you can transmit it electronically. The following fields will display:

- **Action Code** — Use the drop-down list to select the type of action for this synopsis.
- **Submission/ Transmission Date** — A read-only field that is set when the synopsis is submitted for transmission/transmitted
- **Response Date** — If Sources Sought, Presol Notice, or Mod to Presol Notice is selected under Action Code, enter the date responses are due from the contractor (will prefill from document if entered).
- **Classification Code** — Enter the classification code or use the lookup button and make a selection. (will prefill from document if entered) A description of the items will then display.
- **Subject** — Enter a brief subject for the synopsis. This is a required field.
- **Solicitation #** — Enter the solicitation #.

NOTES:



?? **Contact Points** Enter the name, phone number, and email address for the primary point of contact for the document. If the buyer and contracting officers' information is filled in, this field will prefill with that information. You can edit the field if necessary.

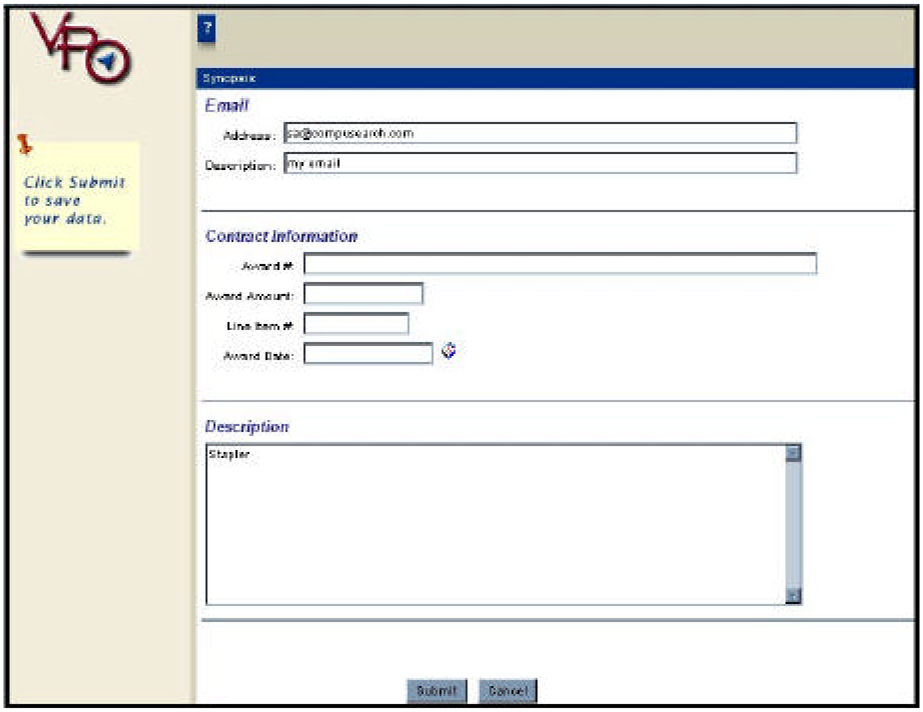
?? **Contracting Office Address** Enter the Contracting Office or use the lookup button to select from the list. If a selection is made, the address will be automatically generated. Changes can be made for this solicitation and will not affect the PRISM database.

?? **Contractor Address** Will only be active for and **Award Notice**. You can manually enter the address or click the lookup button and select from the list provided.

?? **Web Link** Enter the URL and the name of the document site. The URL is required.

?? **EMail** Enter the email address of the primary point of contact for any questions regarding the synopsis. If an email address is entered a description is required.

NOTES:

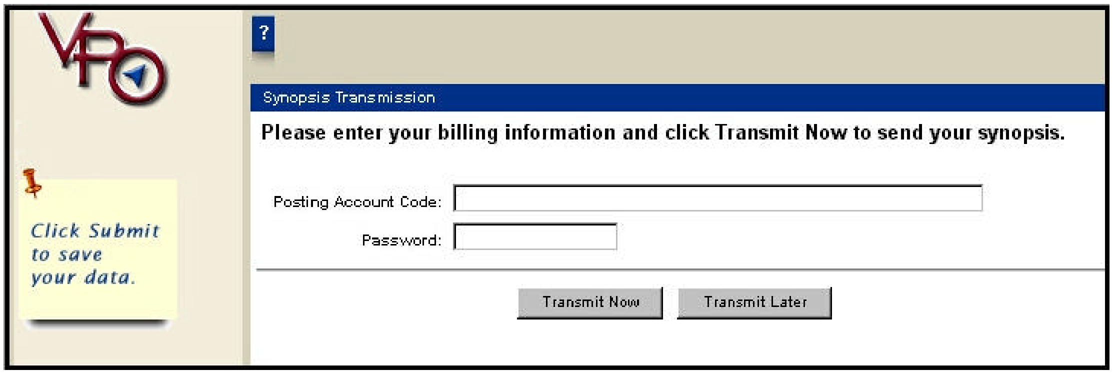


- **Contract Information** — Only active if **Award Notice** is selected. Enter the **Award #, Award Amount**, **Line Item #**, and the **Award Date**. This information is required.
- **Description** — Enter a description of the item. This information is required.

When all information has been entered, click **Submit** to record your data, or **Cancel** to return to the *Synopsis* page without saving your data.

PRISM will check the synopsis for required information and, if all required items have been entered, will give you the option of transmitting the synopsis now. If **Yes** is selected the Transmit page will display.

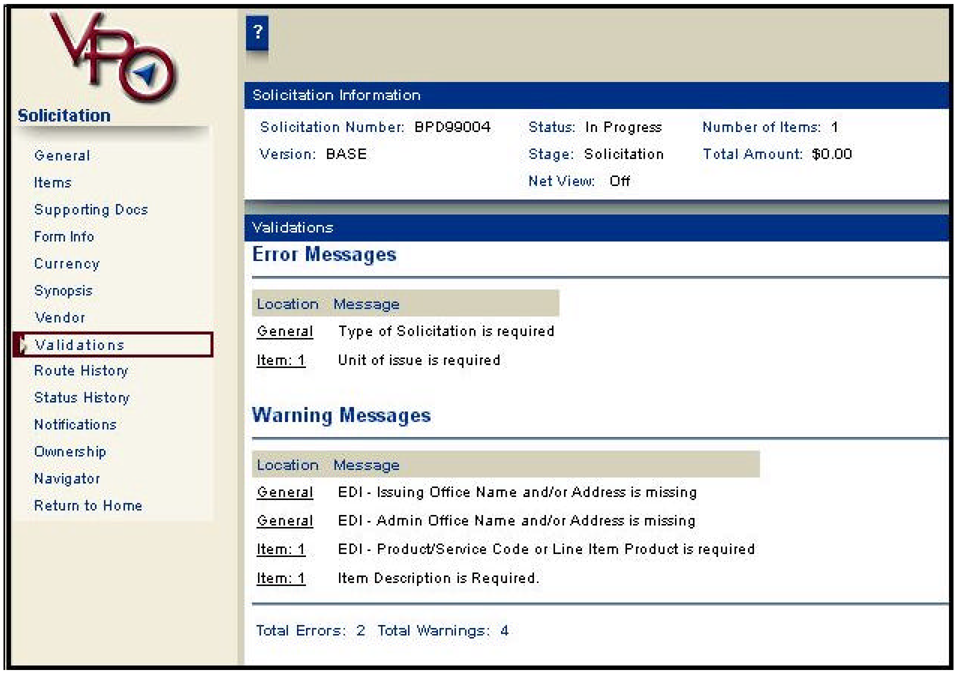
NOTES:



The **Posting Account Code** field and **Password** field will prefill from the **Posting Options** selected under Site Setup. The user can change these as necessary. If **Transmit Now** is selected, the synopsis will be queued for transmission and the **Submission Date** field on the *Synopsis* page will be set to the current system date. If **Transmit Later** is selected the information entered will be saved and the user will return to the *Synopsis of Solicitation* page.

NOTES:

Validations



Click **Validations** to display a summary of the errors and warnings. Error messages must be corrected before the document can be routed. Warnings are informational only and can be corrected at your discretion. To correct either, click the hyperlink in the Location column. PRISM will return you to the page where the error is located. After correcting the error or warning, click Validations again to correct the next one or to test that your change fixed the problem. The following is an explanation of the column headings.

?? *Location:* Designates where the problem is located. To move to the section, click the hyperlink under the location in this column.

?? *Message:* The message describes the problem.

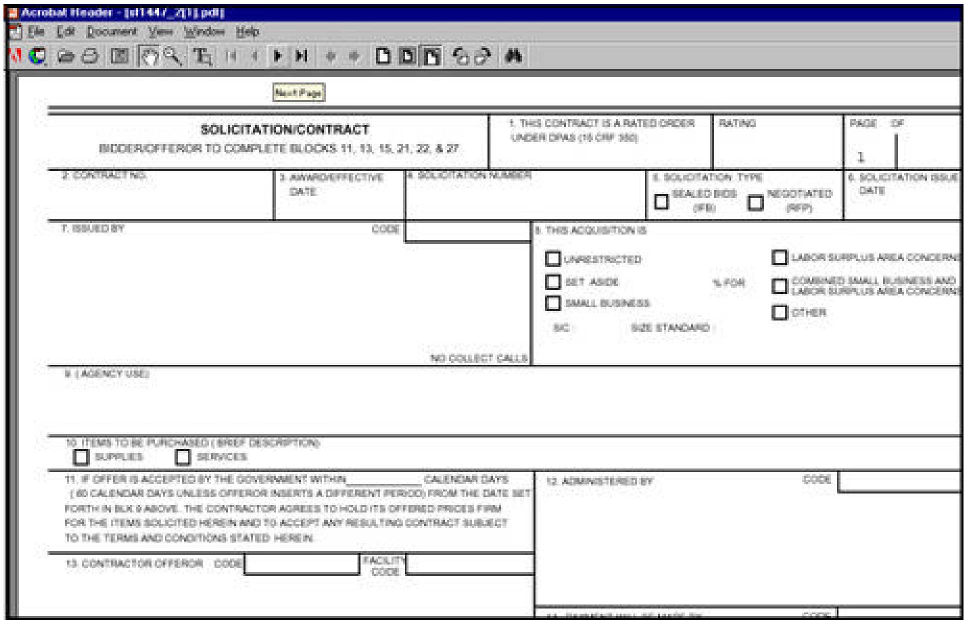
Releasing a Validated Solicitation

If your agency does not require a solicitation to be routed and approved prior to release, your solicitation is now ready to release. Releasing the document will prevent any additional changes to be made. If any changes are required, an amendment must be created. To release the document click **Release** on the *General* page. A confirmation page will display. Click **Yes** to continue the release or **No** to cancel.

NOTES:

Printing a Solicitation

To print an open solicitation, click **View Form**. Adobe Acrobat Reader will launch and a new browser window will open displaying the form.



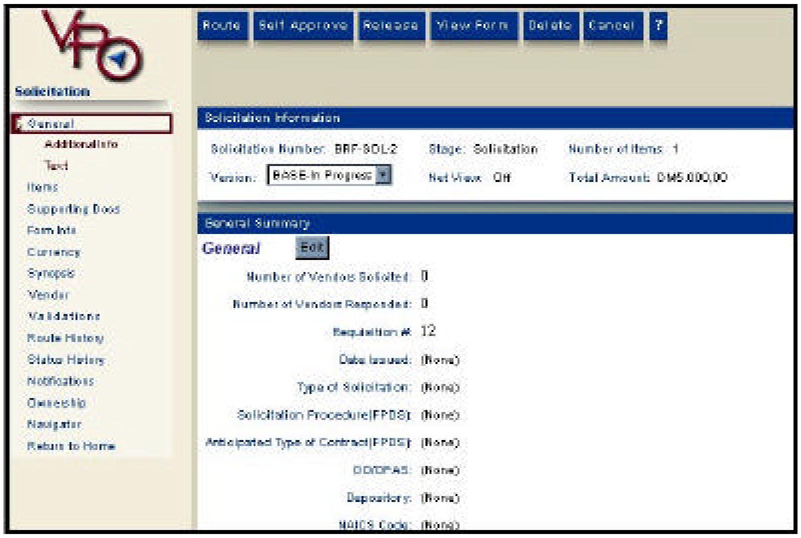
Use the scroll bars to view the entire page. In a multiple page document, click the Next Page icon to see the next page or the Previous Page icon to return to the previous page. When ready, select the printer icon from the Acrobat Reader toolbar.

The *Print* dialog box will display. Select the range of pages you wish to print, then click **OK**. To return to PRISM, close Acrobat Reader and the other browser window.

NOTE: If you elect to save the file to disk for later viewing/printing, you will get a confirmation window when complete. Adobe Acrobat Reader will not launch.

NOTES:

Routing a Solicitation



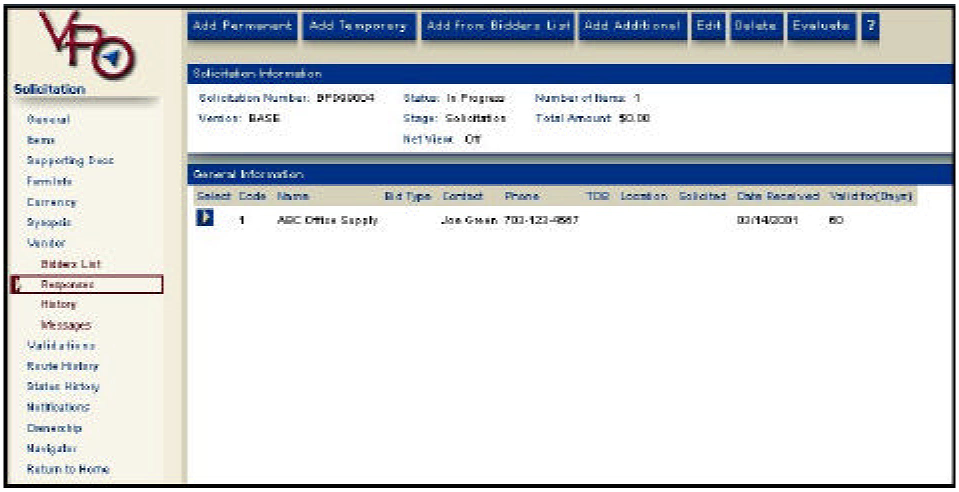
After you have finished adding all of the information to the solicitation, and if your agency requires it, you can route the solicitation for review and/or approval. To route the document, select **General** on the Menu, then click **Route** on the toolbar.

PRISM will transfer your to the Create Route List page from which you can either select a Route List from existing lists or you can create a new list especially for the current solicitation.

For further information on creating a Route List for your document, please see the Introduction Module.

NOTES:

Recording Bids



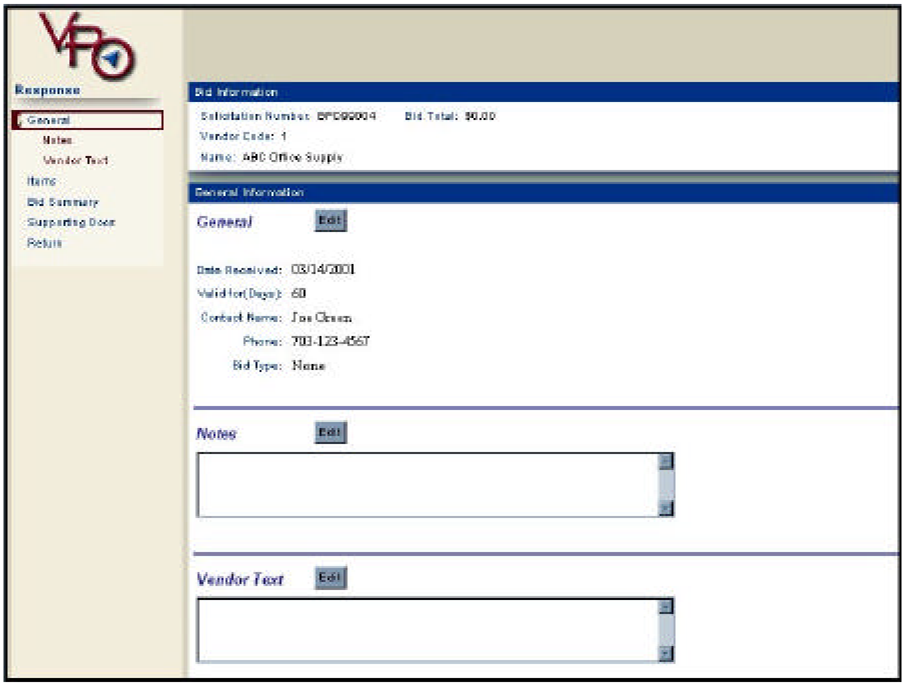
Vendor Responses

Click **Vendor/Responses** to display or enter the vendors who have responded to this solicitation. The *General Information* page that displays contains much of the same information as the **Vendor/Bidders List** *General Information* page. The following column headings are in addition to the information listed on the **Bidders List**:

- *Bid Type* — Indicates whether an alternate bid, no bid, or if blank a regular bid was received.
- *Date Received* — Will fill with the current date but may be edited.
- *Valid for (Days)* — Will default to 60 days but can be edited.

Click **Add Permanent**, or **Add Temporary** to add a new vendor to the response list. Refer to Adding a Vendor to the Bidders List. Click **Add from Bidders List** to add an additional bid from the Bidders List.

NOTES:



To add additional responses from a vendor, click **Add Additional** or to change information already recorded, click **Edit** on the toolbar to display the *General Information* page. This page contains a Menu, a *Bid Information*, and a *General Information* section.

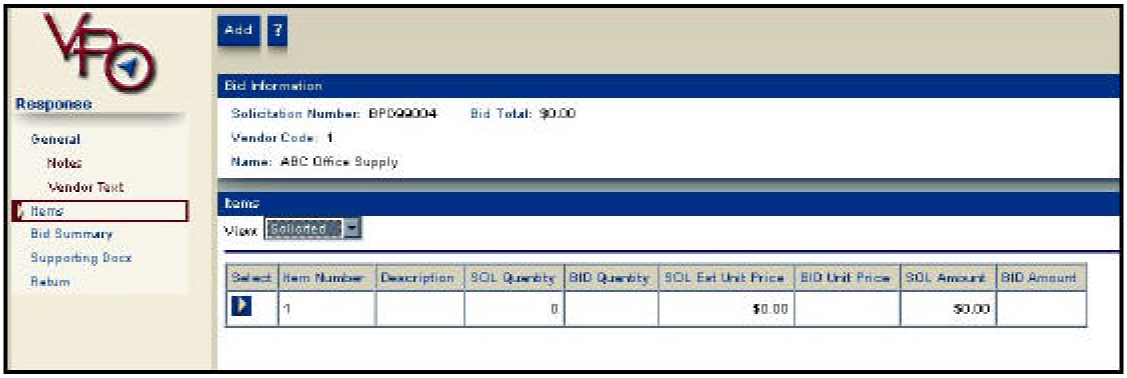
The *Bid Information* section contains basic information about this bid, similar to the *Solicitation Information* section of the *Vendor* page. This information cannot be edited here.

The *General Information* section contains three sections, *General*, *Notes* and *Vendor Text*.

The *Menu* contains the following:

- **General** — Displays the *General Summary* section. Click **Edit** to make changes to the information.
  - **Notes**
  - **Vendor Text** — Click **Notes** or **Vendor Text** to go directly to those sections. Click **Edit** to add or change this information.

NOTES:



?? **Items** Displays the items included in the bid. Select from the **View** drop-down list to display the Solicited or Unsolicited line items.

The blue toolbar may include:

?? **Add** Select the solicited item and click to add an item or set view to unsolicited and click **Add** to add an unsolicited item.

?? **Edit** Select an item and click to edit.

?? **Delete** Select an item and click to delete.

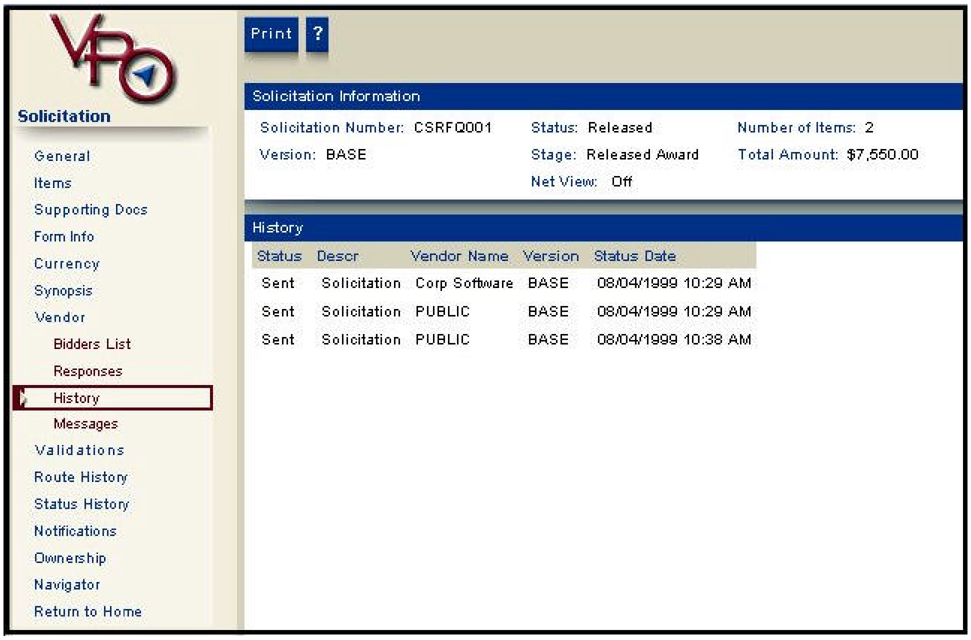
NOTES:

?? **Bid Summary** Displays a summary of the bid.

?? **Supporting Docs** Displays a list of all Attachments and Supporting Docs. Refer to the Supporting Docs section of the Inbox, Preferences, and Documents manual.

?? **Return** Click to return to the *Solicitations* page.

NOTES:



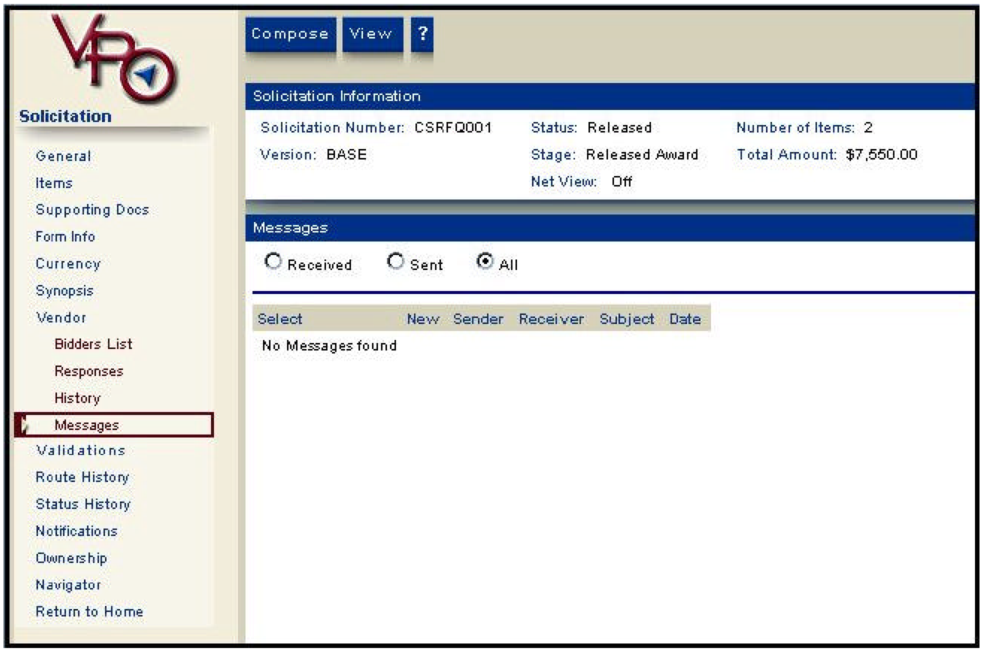
Vendor History

Click **Vendor/History** to view a history of solicitations and bids sent via EDI.

Depending on the document status and your access rights, the blue toolbar may include:

?? **Print** Click to print the history.

NOTES:



Vendor Messages

Click **Vendor/Messages** to view a list of messages to and from EDI vendors. The *Received*, *Sent*, or *All* radio button can be selected.

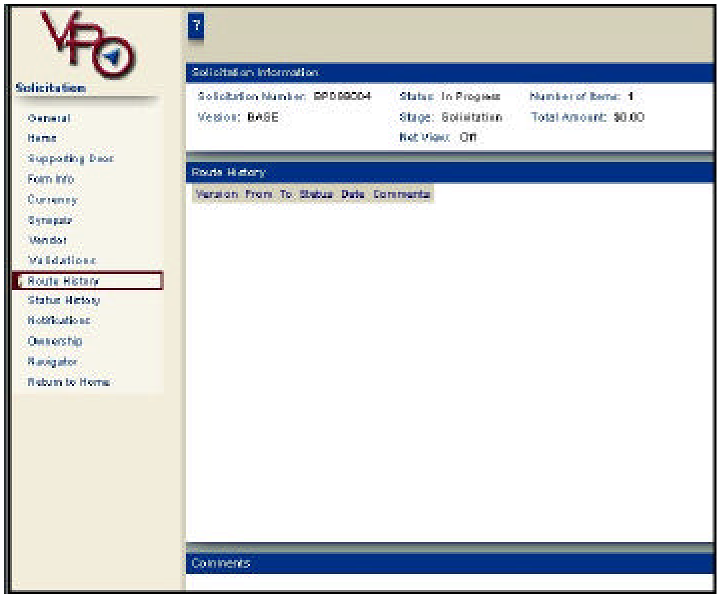
Depending on the document status and your access rights, the blue toolbar may include:

?? **Compose** Click to compose a message to a vendor.

?? **View** Click to open a message for review. The message can then be printed.

NOTES:

Route History



Route History: This section provides a complete history of a routed document. If a document has not been routed, this section will appear blank. The following is an explanation of the column headings.

?? *Version:* There can be multiple versions of a document. A designation of Base indicates that it is the original document. If amendments or modifications have been created, then the amendment or mod number would appear.

?? *From:* This is the person sending the document.

?? *To:* This is the person the document is routed to.

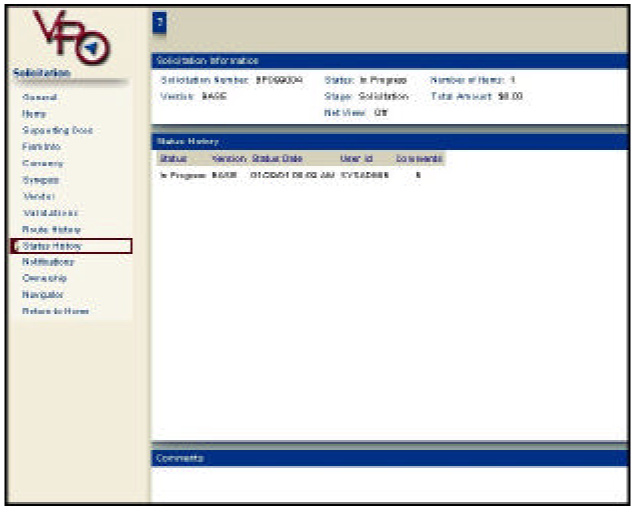
?? *Status:* This designation documents the reviewer/approvers action. For example, if the person approved the document, the status would be "Approved."

?? *Date:* This is the date the document was routed or if the status is approved, disapproved or reviewed, it is the date the action occurred.

?? *Comments:* A "Y" in this column indicates that comments were included. To view the comments for a particular person, click "**Y**." The comments will be displayed in the Comments section below.

NOTES:

Status History



As a document progresses through the various statuses of In Progress, Pending, Approved, etc., the *Status History* page will record the activity, the dates, and who was involved. From here you can tell when a document originated, when it was approved, or even if it was ever reopened.

?? *Status* designations include:

  ?? *In Progress:* Documents that have been created or are in the process of being created and have not been routed or released, or that have been reopened.

  ?? *Pending:* Documents that have been routed for approval and have not yet completed the route.

  ?? *Pending Financial Approval*: Agencies with interfaces to Financial Systems will display this status when the document has completed the approval route and is awaiting Approval/Disapproval by the Financial Office.

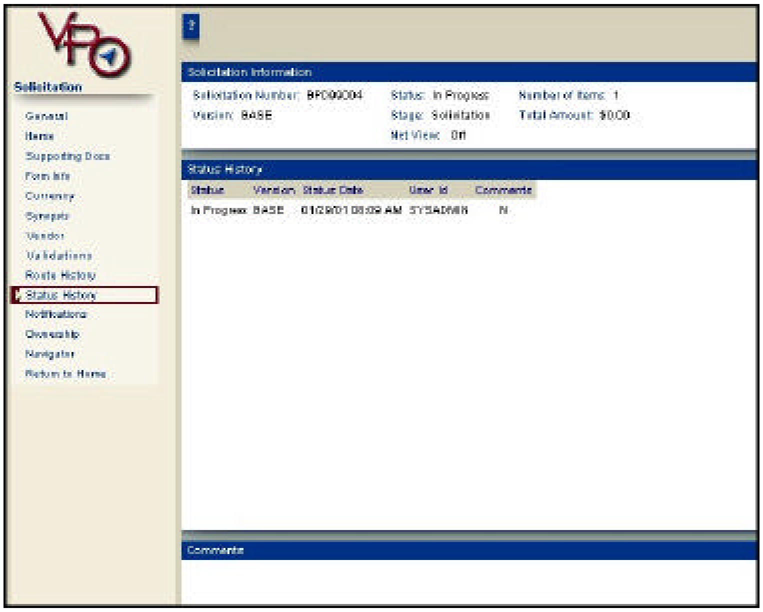
  ?? *Approved:* Documents that have successfully completed the route and were approved.

  ?? *Disapproved:* Documents that have been routed for approval and disapproved.

  ?? *Released:* Documents that have been approved and/or released to the next stage of procurement.

  ?? *Closed:* Documents that have been closed out and are no longer available for further action.

NOTES:



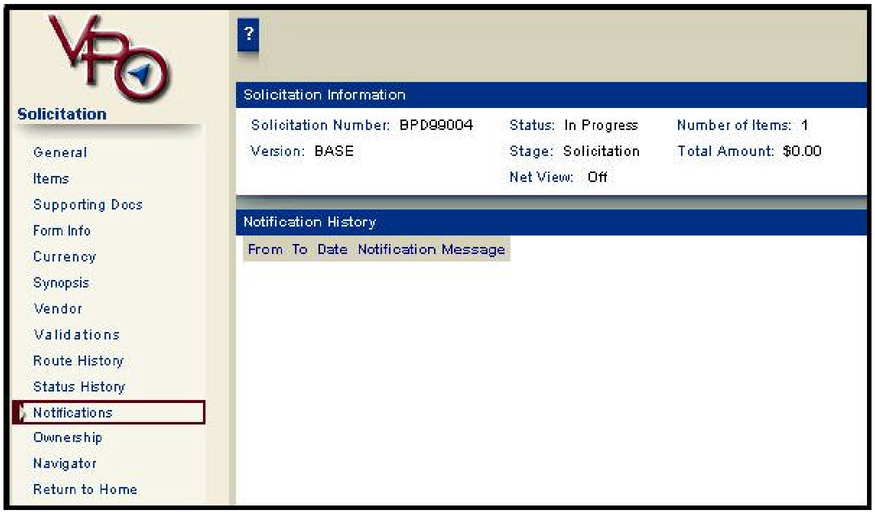
?? *Version:* There can be multiple versions of a document. A designation of Base indicates that it is the original document. If amendments have been created, then the amendment number would appear.

?? *Date:* This is the date of the status change.

?? *User ID:* This identifies the user that affected the change in status.

NOTES:

Notifications



PRISM automatically sends notification messages each time an event occurs. A complete record of all notifications related to this document is kept in this section.

The following is an explanation of the column headings.

- *From:* This is the person who sent the notification.

- *To:* This is the person who received the notification.

- *Date:* This is the date the notification was sent.

- *Message:* This is the notification.

NOTES:

Ownership

This section provides a summary of the access rights to this document. If no users have been designated as having access rights, this section would be blank. The following is an explanation of the fields and column headings.

?? *Public Document Privilege:* This setting designates how much access other system users have to this document. When a document is created, PRISM defaults the public access to Not Public. That means no one other than the originator and those individuals with whom he or she has shared rights can access the document. Other public document privilege settings include Full Access and Ready Only.

?? *Shared User:* A specific user with whom you have shared access rights.

?? *Access:* The level of access granted to a shared user. Access levels include Full Access and Read Only.

Depending upon the document status and your access rights, the blue toolbar may include:

?? **Edit**	Opens the *Document Shared Users* page where you can modify the public access setting as well as add, edit or change shared users to “no access”.

NOTES:

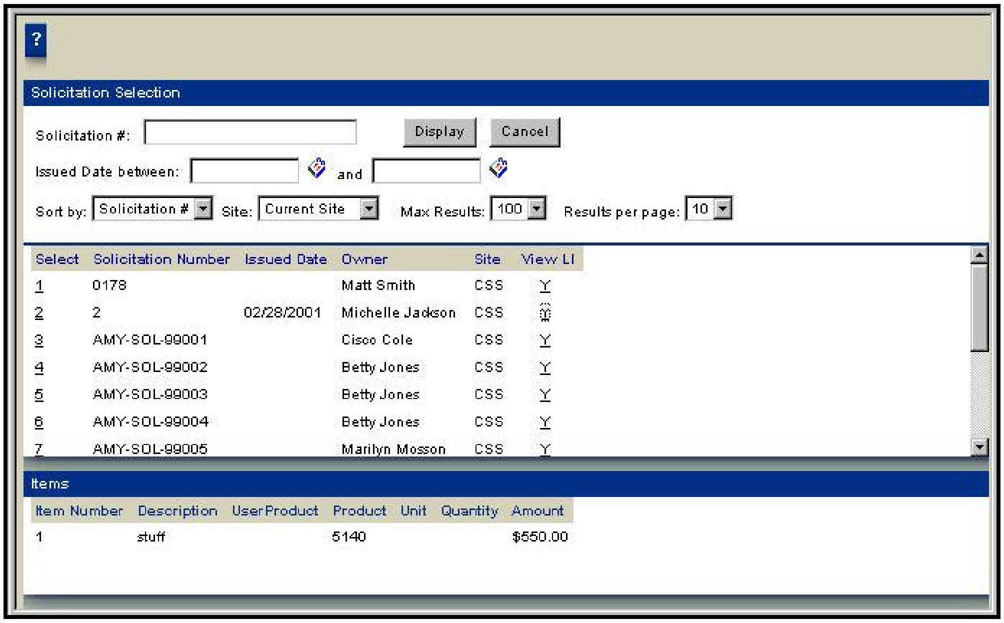
Navigator

Navigator displays a complete record of all documents related to the current document. Examples of related documents include advance procurement plans (APP), milestone plans, solicitations, awards, and invoices. The actual documents can also be accessed through this section by clicking the hyperlink listed. Depending upon the stage/status of the document being viewed and your access/authority level, you may have full access.

NOTES:

Duplicating a Solicitation

To duplicate a solicitation, select **Create Solicitation** on the *Welcome* page, then select **Duplicate Existing Solicitation**, then click **Submit**. The *Solicitation Selection* page will display.



When creating a solicitation by duplicating an existing solicitation, you can search for a specific document by entering its solicitation number or site in the appropriate field. You can further refine your search by searching between certain dates. Once the information you desire to use has been entered, click **Display**.

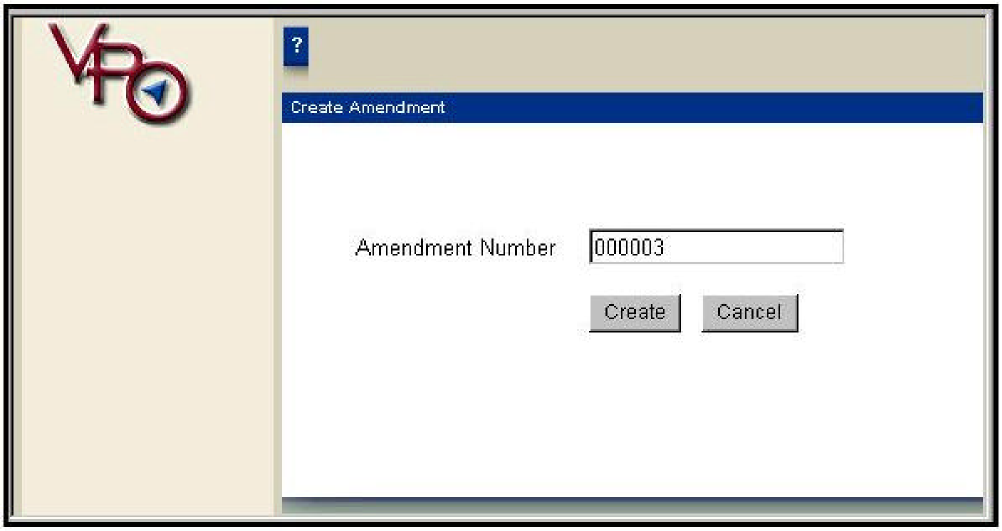
?? **Select** Click this hyperlink to select the document and create the new solicitation by duplication. All items will be included.

?? **View LI** To review a solicitation, click **Y** to display all items included in the selected solicitation in the *Items* section. This selection is for review only.

Refer to the Creating a Solicitation from a Requisition to continue.

NOTES:

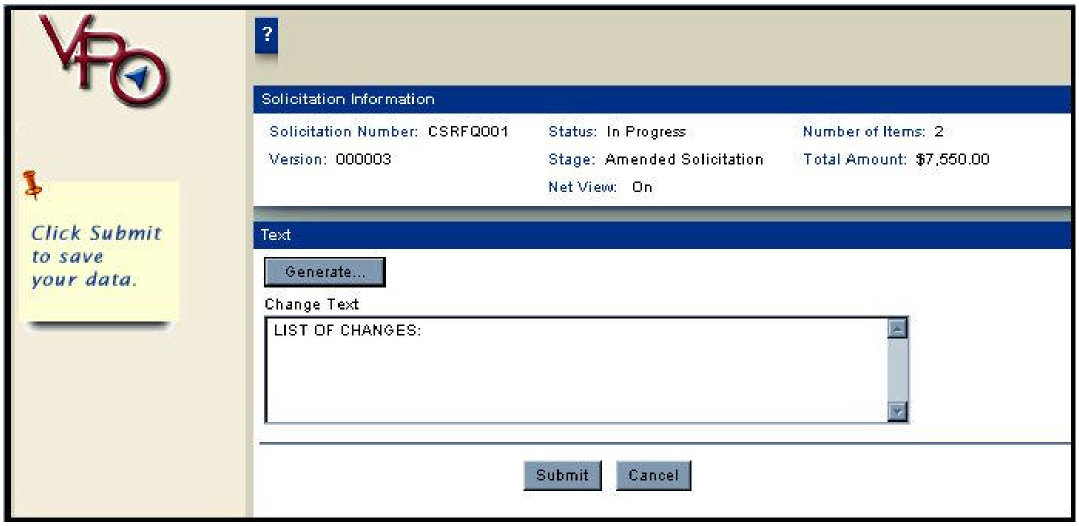
Amending a Solicitation



Once a solicitation has been released, any changes that can be required must be done through an amendment. To amend a solicitation, open the solicitation and click **Amend** on the toolbar. The *Create Amendment* page will display. PRISM defaults with the next sequential number displayed. You can manually edit this number or accept it by clicking **Create**. The *Solicitation* page will display and the amendment number will be displayed in the **Version** field in the *Solicitation Information* section.

Note that when an amendment is created and the *Solicitation* page displays, PRISM defaults with **Net View ON** selected. All of the original information will be displayed. If **Net View Off** is selected the original information would not be displayed.

NOTES:



Edit the solicitation as required. When complete, select the **Change Text Edit** button at the bottom of the *General Summary* page. The *Text* page will display. Click **Generate**. PRISM will automatically create the text indicating the changes made in this amendment. This text can be edited if necessary. Click **Submit** to save the text.

Once created, route the document for approval if required and release. If additional changes are required after release, another amendment must be created.

NOTES:

Canceling a Solicitation

Canceling a Line Item on an In Progress Solicitation

A complete solicitation or individual line items can be canceled depending on the document status. For In Progress solicitations, only line items can be canceled. Entire In Progress contracts must be deleted. For Released contracts, the entire contract can be canceled, but you must create a modification to cancel it.

To cancel an item on an In Progress solicitation, open the appropriate document and click **Item** on the Menu. Select the item and click **Change Status** on the toolbar. The *Change Item Status* page will open with the **Cancel** option selected. Click **Submit** to continue. PRISM will reconfirm your action and then return to the *Items* page where the status of the item will now be Canceled. If you want to reverse the cancellation, click **Change Status**. The option on the *Change Item Status* page will now change to **Uncancel**. Click **Submit**, PRISM will confirm, and then return to the *Items* page.

NOTES:

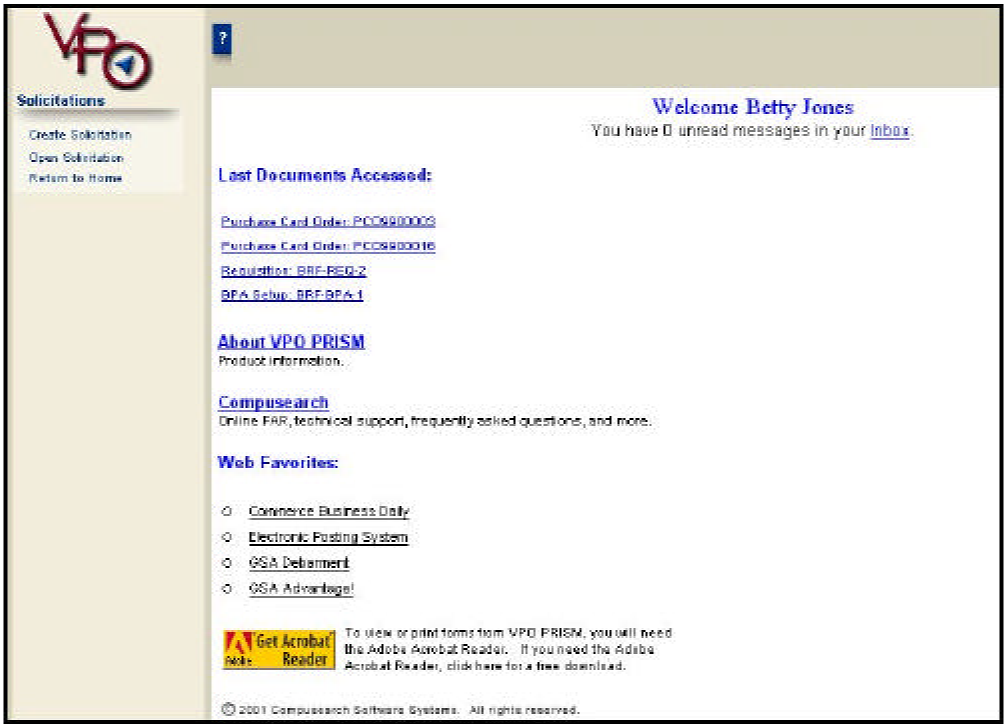
Canceling an Entire Released Solicitation

Once a solicitation has been released, it can be canceled if necessary. To cancel a released solicitation, click **Cancel** on the toolbar. The *Cancel Document* page will display.

A warning message is displayed stating all funds will be deobligated. If you are positive you want to cancel the document, click **Yes**. Click **No** to stop the cancellation process.

NOTES:

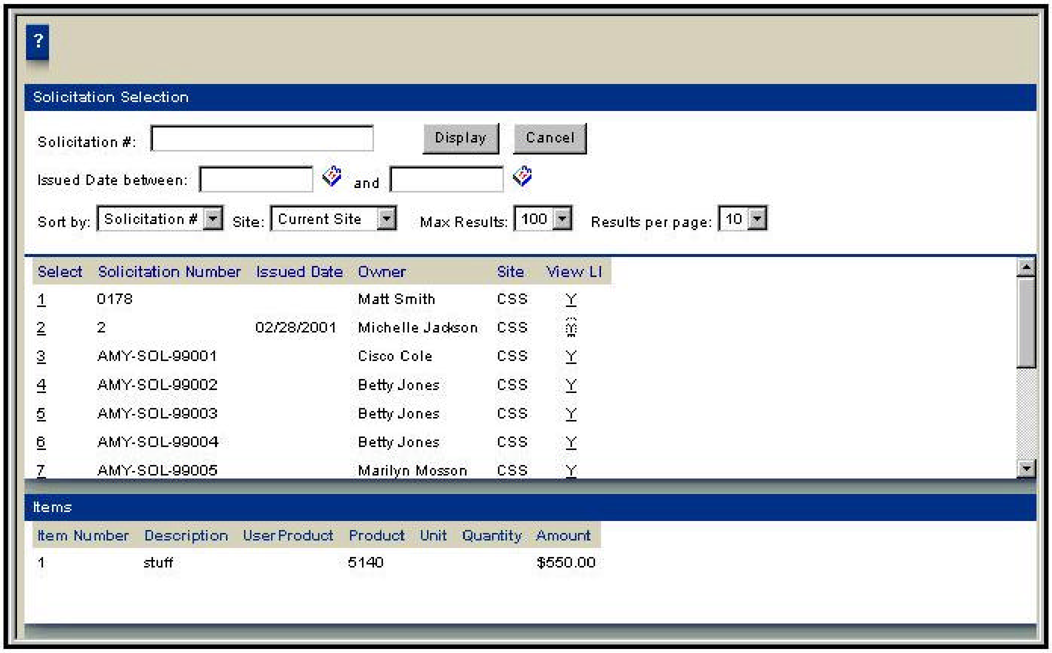
Editing a Solicitation



To edit an existing solicitation click **Solicitations**, **Open Solicitation** on the Menu. The *Solicitation Selection* page will display.

NOTE: If you have recently used the solicitation you wish to open, it may display on the Welcome page under Last Documents Accessed. If so, click the hyperlink there to open the document.

NOTES:



The upper section of the page provides you with the tools you can use to change or refine your search. After defining your search criteria, click **Display** and PRISM will return the solicitations that match. Click the hyperlink to open the solicitation.

You can then edit the document as necessary.

NOTE: Only solicitations that are In Progress can be edited. Once released a solicitation can only be viewed or amended.

NOTES:

Reference-Toolbars by Menu Options

The following is a list of options that display on the Menu located to the left of the page. To access any section, click on the page title.

General

This section provides an overview of the basic document data. Depending upon the document status and your access rights, the blue toolbar may include:

- ?? **Route** — Routes the document for review/approval. Prompts will guide you through the process of creating a route list, entering notes, etc. The **Change Route** button does not display when this button is present. Refer to Routing Lists section of the Inbox, Preferences, and Documents Module for further information.
- ?? **Change Route** — Allows you to change the current document route. The originator of the route can add, delete or change the order of receipt for any user who has not yet received the document. Reviewers/approvers can add people to the route, adjust the order of receipt, or delete themselves. The **Route** button does not display when this button is present.
- ?? **Self Approve** — This option is only available if you own the solicitation and have rights to approve your document in your user profile. Click to go directly to the Validations page.

NOTES:

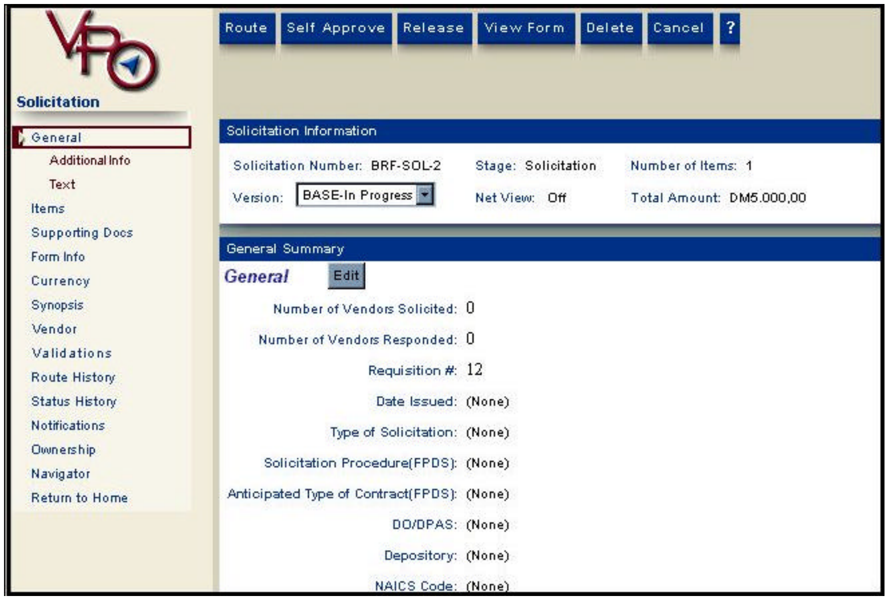
?? **Release** Releasing the document makes it available to move to the next stage of procurement.

NOTE: Once the document is released, the Status in the Solicitation Information area will change to Released. No changes can be made to a released document. If changes are required, create an amendment. If you have questions about how to handle a solicitation that may have been released in error, see your System Administrator.

?? **View Form** Displays the data on the agency's actual solicitation form. The document can also be printed from this area. This option requires that Adobe Acrobat Reader is installed on your hard drive. Acrobat reader is available free from www.adobe.com. If you have questions about whether it is installed or how to install it, see your System Administrator.

?? **Reopen** Changes an approved or disapproved document status back to In Progress, or a Closed document back to its previous status so that changes can be made. Reopened documents must be sent back through the approval process.

NOTES:



?? **Approve** Begins the approval process.

?? **Disapprove** Begins the disapproval process.

?? **Delete** Click to delete the document.

?? **Mark Reviewed** Allows you to mark the document reviewed so that it will continue its route. It does not indicate that the document was either approved or disapproved.

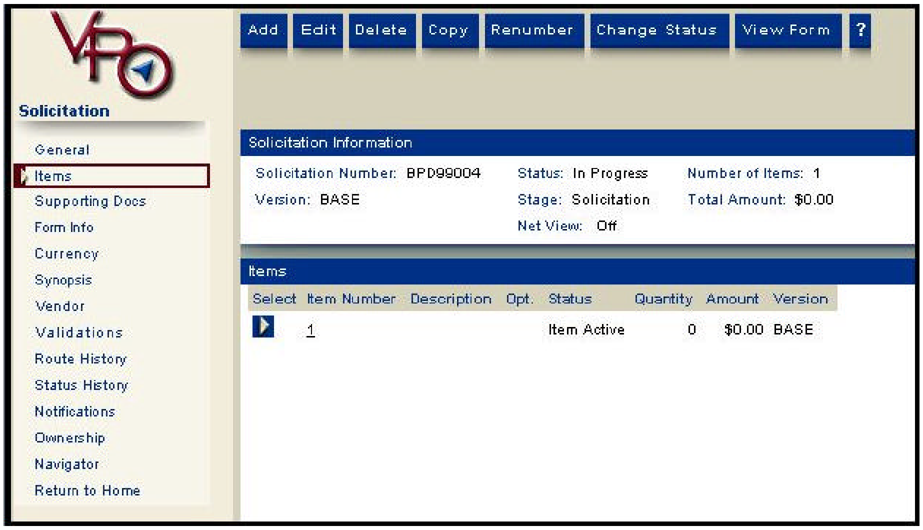
?? **Amend** Refer to Amending a Solicitation.

?? **Cancel** Click to make the document unavailable for further procurement actions.

?? **Net View ON/Off** Click to turn Net View on or off in the *Solicitation Summary* section. Note that with Net View off, only information contained in the current version will display.

?? **Closeout** Refer to Closing Out a Solicitation.

NOTES:



Items

This section displays all data related to the line items. Depending upon the document status and your access rights, the blue toolbar may include:

?? **Add** — Opens the *Items* page where you can select the method of adding a line item. (New, from Requisition, Duplication)

?? **Edit** — Opens the *Item Summary* page where you can edit the selected line item.

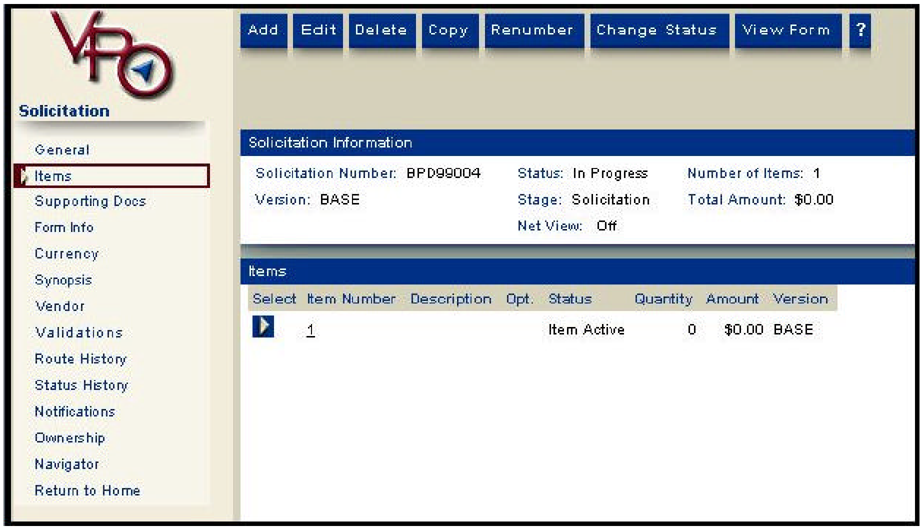
?? **Open** — Opens the *Item Summary* page in a read-only format. This button does not display when the **Edit** button is present.

?? **Delete** — Deletes the selected line item.

?? **Copy** — Copies the selected line item. Helpful for speeding the process of entering line items with similar characteristics. After the line item has been copied, it can be edited as needed.

?? **Renumber** — Opens a page where line items can be renumbered.

NOTES:



?? **Change Status** Changes the status of the selected line item. Status designations include:

Item Active: Indicates that item is available for further procurement action.

Canceled: Decommits or unencumbers funds associated with the line item and prevents further procurement action.

Note: Suspended or canceled line items can be unsuspended or uncanceled by selecting the line item and clicking Change Status on the toolbar.

?? **View Form** Displays the data on the agency's actual contract form. The document can also be printed from this area. This option requires that Adobe Acrobat Reader is installed on your hard drive. Acrobat reader is available free from www.adobe.com. If you have questions about whether it is installed or how to install it, see your System Administrator.

NOTES:

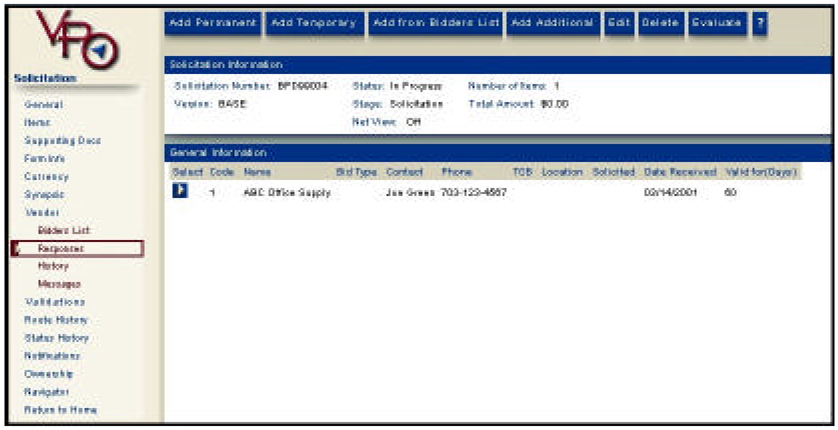
Vendor

Click to display the following choices:

?? **Bidders List:** Click to display a list of the solicited vendors. Depending upon the document status and your access rights, the blue toolbar may include:

??	**Add**	Opens the *Add Vendor* Options page which provides access to the *Vendor Selection* page where you can select a vendor from the PRISM database. Once the vendor is selected, the vendor will appear in the *General Information* section of this page. **Note**: There is not a hyperlink under the vendor code as there is for Temporary Vendors (see Add Temporary below). This vendor information cannot be edited.
??	**Edit**	Only temporary vendors can be edited. Opens the selected vendor's detail page where you can edit or review the temporary vendor's information.
??	**EDI**	This button appears after the solicitation has been released and if there are EDI vendors included. Click to open the *Send Document-EDI* page. Specific vendors or all EDI vendors can be selected.
??	**Issue**	After the solicitation has been released, will issue it to the vendor list.
??	**Delete**	Deletes the selected vendor. This only deletes the vendor from the document and does not affect the PRISM vendor database.

NOTES:



?? **Responses:** Click to display a list of responding vendors.
Depending upon the document status and your access rights, the blue toolbar may include:

?? **Add Permanent**	Click to add a vendor from the permanent vendor list.
?? **Add Temporary**	If a vendor does not exist in the PRISM vendor database, the vendor can be entered as a temporary. That means the vendor information would only be available for this document and would not affect the PRISM vendor database. Refer to Add a Temporary Vendor.
?? **Add from Bidders List**	Click to add a vendor from the Bidders List.
?? **Add Additional**	Click to add an additional bid received from the selected vendor.
?? **Edit**	Click to edit information about the selected vendor or bid.
?? **Delete**	Click to delete the selected bid.
?? **Evaluate**	Click to display an evaluation of all bids.

NOTES:

Supporting Docs

Displays a list of all attachments and supporting documents. Depending upon the document status and your access rights, the blue toolbar may include:

?? **Add** — Adds an attachment or supporting document to this procurement document file.

?? **Check In** — Returns a document that had been checked out to the PRISM database and makes it available for editing by other users. To check in a document, click **Check In** and follow the prompts.

?? **Check Out** — Makes a copy of the selected supporting document or attachment and saves it to your computer. PRISM does not allow changes to the attachments or supporting documents stored in the database. If a change is required, the document must first be checked out. What this means is that PRISM will make a copy of the attached file or supporting document and save it to your hard drive. Once the change is made to the checked out version, the file must be checked in. PRISM maintains an audit trail of when the document is edited and by whom. Only one person at a time can check out a document. When a document is checked out, it is put into a locked state. That means another user can view it, but they can't check it out and make changes until it is checked back in again. To check out an attachment or supporting document, select the document and click **Check Out**.

NOTES:

?? **View** Launches the application that created the attachment or supporting document so that it can be viewed or printed. For example, if the supporting document was a MS Word file, PRISM would launch MS Word and open the file. The document can also be printed at this time. If the associated application is not available on your computer, you will not be able to view it. To view a document, select it and click **View**.
It is important to note that any changes made to the document while viewing will not be reflected in the version attached to the procurement document. To make changes to the attached file, you must use the **Check Out** and **Check In** options.

?? **Delete** Deletes the selected supporting document and removes all record of it from the database. To delete the file, select it and click **Delete**.

?? **Detail** Opens the *Details* page where information such as the document description, whether it is required or not, exceptions, etc., can be viewed or edited.

?? **Approval** Opens the *Approve Document* page where the selected document can be marked as approved.

NOTES:

?? **Sequence** Opens the *Resequence* page where you can edit or review the sequencing of attachments. Supporting documents are not sequenced.

?? **Unlock** Unlocks a document that is checked out and makes it available to other users for editing. This can only be done by a System Administrator.

?? **Convert** Changes the designation of the selected document from attachment to supporting document or supporting document to attachment. The document will move to the correct section of the page.

NOTES: